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The Impact of Cable and Pay Cable Television On Local Station Audiences

Prepared for
National Association of Broadcasters
1771 N Street, N.W.
Washington, D.C.

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THE IMPACT OF CABLE AND PAY CABLE TELEVISION ON LOCAL STATION AUDIENCES

Within the last decade, television stations have witnessed a substantial growth in the size and number of "new" delivery systems serving local audiences. Foremost among these has been cable television, which currently serves about 30 percent of all television households in the United States. Many of these homes can now watch distant "superstations," pay movie channels, news networks and a host of specialized services, in addition to their local stations. The presence of these new competitors has raised concerns that cable might erode the audience for local stations.

This study is intended to serve as a status report on the impact that cable and pay cable television have had on local station audiences. Unlike a number of earlier studies that developed statistical models to predict the effect of cable competition on television stations, this report seeks only to describe the current state of

affairs. It does so through a secondary analysis of Arbitron television diary data collected in a number of markets across the country. More specifically, this research compares the audiences for various types of stations and programs across three reception types; 1) "broadcast" households that receive only over-the-air signals, 2) "basic cable" households that subscribe to a cable system, and 3) "pay cable" households that subscribe to a system and one or more pay channels.

EXECUTIVE SUMMARY

This study assessed the impact that cable and pay cable have had on local stations by comparing station audiences across broadcast only, basic cable and pay cable reception types. Arbitron television diary data, collected in 24 ADI's during February, 1982, were used in the analysis. Results were reported in three major sections: descriptors of reception type audiences, station audiences and program audiences.

Descriptors of Reception Type Audiences. A number of differences among broadcast, basic cable and pay cable viewers were evident in virtually all markets. Differences between pay cable homes and other reception types were particularly pronounced. The heads of households in pay cable homes were, on average, younger. Individual viewers within that group also tended to be younger, with very few people age 65 and older. In an

average week, pay cable households watched more hours of television and used more channels than those in other reception types. Finally, pay cable households were almost always larger than broadcast or basic cable homes.

Station Audiences. The average weekly audience for local stations was reported in each of eight different market types, categorized by the number and kind of commercial stations in the market. The audience share for most commercial stations was largest among broadcast viewers, smaller among basic cable viewers and smaller still among pay cable viewers. Taken as a group, the weekly TVHH share for all local stations was 28 to 40 percent smaller among pay cable homes than broadcast homes (see Table VII).

While almost every commercial station appeared to lose audience shares to cable competition, the magnitude of that loss differed from station to station. Generally, VHF affiliates had the greatest absolute reduction in audience shares among cable and pay cable viewers. This was especially true for VHF affiliates in markets with other UHF affiliates. UHF affiliates in intermixed markets, however, had relatively modest declines in weekly shares. Similarly, local UHF independents had relatively small reductions in weekly audience shares among cable and pay cable viewers.

For those viewers who had basic cable service, a substantial portion of weekly viewing shifted to distant stations. Among pay cable subscribers, both distant stations and pay services accounted for appreciable shares of weekly viewing. During prime time, pay cable subscribers typically spent more time watching pay cable channels than any one local affiliate. Pay channel viewing was particularly high among men 18 to 49. Generally, other cable only services like news networks and sports channels attracted small weekly shares.

Finally, though station shares were usually lower in non-broadcast households, cable services did not appear to have an adverse impact on weekly TVHH circulation. In fact, the circulation of many UHF stations was actually highest among cable and pay cable homes.

Program Audiences. This research looked specifically at the impact cable and pay cable had on the local news and prime time access programs aired by network affiliates. These analyses were based on 12 of the original 24 markets, which were reorganized into market categories defined by market rank.

As with weekly audiences, local news shares (both early and late evening) were highest in broadcast homes and lowest among pay cable viewers. The magnitude of these differences, however, varied with market size and demographic groups. The audience for local news programs

in larger markets showed a relatively modest decline across reception types in comparison to smaller markets. Further, local news shares were highest, and seemed least affected by cable competition, among adults age 50 and older.

Prime time access programs aired by local affiliates also evidenced a loss in audience shares across reception types. For access programs, differences among demographic subsets of the audience were generally less pronounced than was the case for local news. During this time period, both cable and pay cable viewers, especially those in smaller markets, turned to distant stations. Pay cable channels had relatively small audience shares compared to their prime time levels.

METHODS

The results reported in the following chapter are based on a secondary analysis of Arbitron Television diary data collected in 24 markets during February, 1982. This chapter describes how these data were selected and analysed. It is divided into three sections: 1) "the data base," which discusses the nature of the diary data, 2) "the markets," which describes how markets were chosen and categorized into market types, and 3) "a definition of terms," which reports how reception types and various measures of audience behavior were defined.

The Data Base

In order to estimate the size and composition of local station audiences, Arbitron surveys a number of markets during various "sweep" months of the year. Arbitron measures viewing behavior by placing one or more "diaries"

in a probability sample of households within each "ADI" or Area of Dominant Influence.

The format of the diary requires respondents to report what, if any, television station and program were viewed in the home during each of 80 quarter hours throughout the broadcast day. Additionally, respondents are instructed to report the age and sex of each person viewing the set during each 15 minute interval.[1] Diaries are kept for a period of one week. Consequently, four independent samples, each reporting one week's TV use, are used to produce audience estimates for the survey month.[2]

Ultimately, diaries are returned to Arbitron and the information they contain is coded and stored in computer memory for subsequent analysis. These files of data include a number of variables describing each household's characteristics (e.g. number of family members, the number of stations viewed, whether it subscribes to a cable system, etc.), the extent to which the household viewed various stations and, of course, the actual diary entries.

Copies of these ADI files were obtained from Arbitron for use in the present research. In order to compute the

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[1]For a general description of diary methods see: Webster, J. Audience research. Washington: National Association of Broadcasters, in press.

[2]For a technical description of the methods Arbitron employs see: Description of methodology. New York: Arbitron Company, October, 1980.

audience behaviors reported in this study, two new files of data were created from the original Arbitron data base. The first file, which used the television household (TVHH) as the unit of analysis, contained household demographic characteristics and a quarter hour by quarter hour record of what each household viewed. The second file, based on individuals as the unit of analysis, again contained various demographic descriptors and a quarter hour by quarter hour record of what each person viewed.

One important difference between this study and research reports published by Arbitron should be noted. In order to estimate the total size of station audiences as accurately as possible, Arbitron "weights" its diary data. This research, which was primarily concerned with finding differential patterns of station use by reception type for households and demographically defined subsets of the audience, employed no such weighting factors. Consequently, the results reported here may differ slightly from those published in Arbitron market reports.

The Markets

This study did not report how any one television station fared against cable competition. Rather, results were reported for types of stations or programs in various types of markets. Two schemes of market categorization were used.

Station Audiences. In the section of results dealing with weekly station audiences, eight market types were used. Here, market types were defined by the number and kind of local commercial stations in a market. The Broadcast Research Center, in consultation with the NAB Research Department, chose three markets to represent each type. Consequently, a total of 24 markets were selected. Throughout the selection process, an effort was made to include both economically and geographically diverse market areas. Table I-1 lists the markets chosen to represent each of these eight market types.

Program Audiences. The section of this report dealing with program type audiences (i.e. local news and prime time access programs) used twelve of the original 24 markets. This subset was chosen to avoid the complications presented by atypical program scheduling and local pre-emptions. Further, these markets were reorganized into one of four types defined by market rank. Table I-2 lists the markets employed in this part of the study and hours used to define early news, late news and prime time access in each market.

TABLE I-1

Markets for Analysis of Weekly Station
Audiences by Market Type

MARKET	Number of VHF Affiliates	Number of UHF Affiliates	Number of VHF Independents	Number of UHF Independents	ADI Cable Penetration[1]
MARKET TYPE 1: 4 VHF / 1+ UHF STATIONS					
Chicago, IL	3	0	1	3	6%
Dallas-Ft. Worth, TX	3	0	1	4	13%
Portland, OR	3	0	1	1	19%
MARKET TYPE 2: 3 VHF / 2+ UHF STATIONS					
Greensboro-Winston-Salem, NC	3	0	0	2	19%
Philadelphia, PA	3	0	0	3	26%
Tulsa, OK	3	0	0	2	37%
MARKET TYPE 3: 3 VHF / 1 UHF STATIONS					
Buffalo, NY	3	0	0	1	38%
Memphis, TN	3	0	0	1	19%
San Antonio, TX	3	0	0	1	29%

TABLE I-1 (continued)

Markets for Analysis of Weekly Station Audiences by Market Type

MARKET TYPE 4: 3 VHF STATIONS					
Colorado Springs-Pueblo, CO	3	0	0	0	22%
Greenville-New Bern-Wash., NC	3	0	0	0	17%
Portland-Poland Springs, ME	3	0	0	0	36%
MARKET TYPE 5: 2 VHF / 1 UHF STATION					
Baton Rouge, LA	2	1	0	0	32%
Savannah, GA	2	1	0	0	30%
Sioux City, IA	2	1	0	0	25%
MARKET TYPE 6: 1 VHF / 2 UHF STATIONS					
Austin, TX	1	2	0	0	51%
Ft. Myers-Naples, FL	1	2	0	0	60%
Madison, WI	1	2	0	0	25%

TABLE I-1 (continued)

Markets for Analysis of Weekly Station Audiences by Market Type

MARKET TYPE 7: 3 VHF STATIONS

Bakersfield, CA	0	3	0	0	59%
Lexington, KY [2]	0	4	0	0	30%
Youngstown, OH	0	3	0	0	29%

MARKET TYPE 8: 2 STATIONS

Chico-Redding, CA	2	0	0	0	45%
Lansing, MI	2	0	0	0	35%
Springfield, MA	0	2	0	0	36%

[1]Estimated percent of TVHH's in ADI subscribing to cable as reported in February 1982 Arbitron market reports.

[2]The Lexington ADI includes a second NBC affiliate (ch. 57) in Hazard, KY.

TABLE I-2

Markets for Analysis of Program Audiences
by Market Rank

MARKET	MARKET RANK	EARLY NEWS[1]	PRIME TIME ACCESS	LATE NEWS[1]
ARB 1 - 10				
Chicago	3	6:00 PM	6:30 PM	10:00 PM
Philadelphia, PA	4	6:00 PM	7:30 PM	11:00 PM
Dallas-Ft. Worth, TX	10	6:00 PM	6:30 PM	10:00 PM
ARB 21 - 45				
Portland, OR	23	5:00 PM	7:30 PM	11:00 PM
Buffalo, NY	31	6:00 PM	7:30 PM	11:00 PM
San Antonio, TX	45	5:00 PM	6:30 PM	10:00 PM
ARB 51 - 75				
Greensboro-Winston-Salem, NC	51	6:00 PM	7:30 PM	11:00 PM
Tulsa, OK	57	5:30 PM	6:30 PM	10:00 PM
Portland-Poland Springs, ME	72	6:00 PM	7:30 PM	11:00 PM
ARB 101 - 125				
Greenville-Newbern-Wash., NC	101	6:00 PM	7:30 PM	11:00 PM
Colorado Springs-Pueblo, CO	102	5:30 PM	6:30 PM	10:00 PM
Ft. Myers-Naples, FL	122	6:00 PM	7:30 PM	11:00 PM

[1]At these times (Monday thru Friday) all network affiliates in the market were broadcasting local news programs.

A Definition of Terms

This report uses standard industry terminology (e.g. VHF, UHF, affiliate, independent, share, circulation, etc.). In most instances the meaning of these terms is self-evident or widely known. Nevertheless, to avoid any confusion about how various measures of station audiences were computed, the following definitions may be helpful.

Reception Types. All results are reported across three mutually exclusive reception types. Every household in an ADI (and every individual by virtue of his or her membership in a household) fell into one of three types. The "broadcast" type included households that did not report subscribing to a cable system and so were assumed to receive only "off-the-air" television signals. "Basic cable" households were those that reported subscribing to a cable system, but did not report viewing a pay cable channel. "Pay cable" households were those that reported both subscribing to a cable system and viewing at least one quarter hour of a pay cable service in the course of a week (see "pay cable channels").

Pay cable households were defined in this way because, as of February, 1982, Arbitron data did not include a specific variable identifying a home as subscribing to a pay service. It should be noted, however, that defining pay cable homes in this way may understate the

true number of pay subscribers and overstate pay channel shares within this reception type.

Finally, the reader should be reminded that categorizing households into "cable" or "pay cable" types masks the diversity of the systems to which they subscribe. While cable subscription increases a home's viewing options, the magnitude of that increase will vary with the channel capacity and signal carriage decisions of each system.

Local Stations. Local stations were those licensed within the ADI of the market being examined. This report frequently categorized these stations by their channel assignment (i.e. VHF or UHF) and type (i.e. affiliate, independent or ETV). Local stations were categorized on the basis of information provided in Arbitron market reports.

Distant Stations. This category encompassed all broadcast stations that were viewed in a market, but were not licensed within that market's ADI. This group included "imports" like WGN and WTBS, as well as stations licensed in adjacent ADI's.

Pay Cable Channels. Pay cable channels were those for which a subscriber would typically pay an additional fee, above and beyond the cost of basic service. In this research, pay cable channels were operationally defined to include the following services; Cinemax, Cinemerica,

Cinevue, Front Row, Galavision, Hollywood Home Theatre, Home Box Office, Home Theatre Network, Impact Theatre, Prism, Private Screenings, Rainbow/Bravo/Escapade, Showtime, Spotlight, The Movie Channel and Z Channel.

Other Cable Only Channels. This category encompassed the many cable only channels typically offered as elements of basic cable service. Examples of such services would include; Cable News Network (CNN), Christian Broadcasting Network (CBN), Cable-Satellite Public Affairs Network (C-Span), Entertainment and Sports Program Network (ESPN), USA Network and local cable origination.

Average Weekly Shares. The average weekly shares reported in tables III-1 thru III-32 were computed as follows. Within each reception type, the total number of quarter hours that households or persons (depending on the unit of analysis) spent viewing a station or channel throughout the entire week was divided by the total amount of viewing of all stations and channels over the same time period. These specific shares were summed across all stations or channels in a category (e.g. VHF affiliates, UHF independents, pay cable channels, etc.) The average weekly shares reported in the tables are unweighted averages across like station or channel category totals in the three markets of a type.

Average Weekly Prime Time Shares. These share figures were computed just as the average weekly shares, except

that the totalling of quarter hours was confined to prime time. Prime time was defined as 8:00 pm to 11:00 pm Monday thru Sunday for markets in the Eastern and Pacific time zones and 7:00 pm to 10:00 pm Monday thru Sunday for markets in the Central and Mountain time zones. Averages reported in Tables III-1 thru III-32 are again unweighted averages across the three markets comprising a type.

Average Weekly Circulation. Within each reception type, the total number of households or persons (depending upon the unit of analysis) who watched at least one quarter hour of a given local station in the course of a week was divided by the total number of households or persons in that reception type within each market. These individual station levels of circulation were averaged across all stations in the same category (i.e. VHF affiliates, UHF affiliates, VHF independents and UHF independents). The average weekly circulation reported in Tables III-1 thru III-32 is an average across like station categories in the three markets of a type.

Two minor exceptions to the above methods of computing shares and circulation should be noted. First, in the two station market type, no distinction was made between VHF and UHF affiliates. Second, for share calculations involving the Lexington ADI, the audience shares of the forth UHF affiliate (see Table I-1) were included in the

total UHF shares for that market. The same station, however, was excluded from computation of average weekly circulation on the theory that it would unfairly depress the market average.

Average Shares Monday thru Friday. The share figures, reported in Tables IV-1 thru VI-4 were calculated in much the same way as weekly station shares, except that quarter hour totalling was confined to the first quarter hour of viewing during early local news, late local news or prime time access Monday thru Friday. The clock time that defined these quarter hours in each of the 12 markets studied is reported in Table I-2. During the local news time periods, all network affiliates in a market were broadcasting local news programs. Within each reception type in a given market, local affiliate shares were summed into one category without regard to channel assignment. All other local station shares were summed into a second category. Non-market shares were similarly aggregated. As with weekly station shares, the tabled shares are an unweighted average across the three markets comprising the type (in this instance defined by market rank).

Finally, it should be noted that on Wednesday during the final survey week, CBS delayed airing of late local news with a broadcast of the "Grammy Awards." This single quarter hour was excluded from the computation of late news average shares.

Selected Program Type Averages. Share tables on the prime time access audience (VI-1 thru VI-4) include additional information reported as "selected program type averages." Three program type categories were used: 1) "off network" that included programs originally aired on network television like "Happy Days Again" and "M*A*S*H," 2) "first run syndication" that included programs like "Family Feud," "Tic Tac Dough" and "Entertainment Tonight," and 3) "programs with local production" that included shows like "PM Magazine" and local news productions. Within each reception type, the average program type shares were created by totalling the shares for all programs of a type across all markets of a type and dividing by the number of stations airing such programs. Consequently, these average shares will not total to 100. Finally, the programs used to create these averages were only those broadcast on local affiliates. Therefore, no "off network" type average is reported for stations in the top 50 markets.

RESULTS

The results of this research are reported in three major sections. The first, descriptors of reception type audiences, presents a comparison of viewers across reception types in each of the 24 markets studied. The second section reports various measures of weekly station use in each of eight market types. The third section reports differences in various program audiences in each of four market types.

Descriptors of Reception Type Audiences

Tables II-1 thru II-24 present a comparison of reception type audiences in each of the 24 markets examined in this study. The upper portion of each table describes the characteristics of television households in broadcast, basic cable and pay cable categories. The lower portion of each table describes the characteristics of persons within each reception type. The markets are arranged in alphabetical order.

While each market was in some ways unique, a number of reception type differences emerged with such regularity that they should be noted. Overall, differences between pay cable viewers and the other reception types were more pronounced than differences between broadcast and basic cable viewers. In every market, the heads of households in pay cable homes were, on average, younger. Similar age differences were evident across individual household members. Pay cable homes included relatively few people in the 65 and older group and a disproportionately large number of young adults. Perhaps not surprisingly, pay cable homes always averaged more channels viewed in the course of a week than broadcast or basic cable homes.

In almost every market, pay cable households were larger and watched more hours of television than those in the other reception types. Of course, the fact that pay cable homes were larger might account for heavier TV use in those households. Indeed, the average amount of TV viewed by individual pay cable subscribers was higher in only ten of the markets. It should be noted, however, that such individual averages among pay cable viewers were based on relatively younger groups of people who would ordinarily be expected to watch less television.[1]

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[1]Comstock, G., Chaffee, S., Katzman, N., McCombs, M., & Roberts, D. Television and human behavior. New York: Columbia University Press, 1978, p. 92.

TABLE II-1

Austin, TX (Market Type 6)

Descriptors of Reception Type Audiences

Reception Type	Broadcast	Basic Cable	Pay Cable
TV HOUSEHOLDS			
Number of TVHH	204	106	102
Percent of Total TVHH	49.5%	25.7%	24.8%
Average Number of Persons per TVHH	2.4	2.2	2.8
Average Age of Male Head of Household	46.4	43.5	35.3
Average Age of Female Head of Household	45.7	49.1	34.5
Weekly Average Hours Viewing per TVHH	34.76	33.82	40.27
Weekly Average Number of Channels Viewed per TVHH	3.6	5.4	6.9
PERSONS			
Number of Persons	489	238	288
Age Groups: 2 - 11	12.3%	12.2%	18.8%
12 - 17	8.0%	7.6%	9.4%
18 - 34	29.0%	27.3%	44.1%
35 - 49	19.8%	21.4%	19.4%
50 - 64	17.6%	15.5%	6.3%
65 +	13.3%	16.0%	2.1%
Weekly Average Hours Viewing per Person	22.61	21.35	23.04

TABLE II-2

Bakersfield, CA (Market Type 7)

Descriptors of Reception Type Audiences

Reception Type	Broadcast	Basic Cable	Pay Cable
TV HOUSEHOLDS			
Number of TVHH	114	168	106
Percent of Total TVHH	29.4%	43.3%	27.3%
Average Number of Persons per TVHH	2.9	2.6	3.0
Average Age of Male Head of Household	46.9	47.5	40.1
Average Age of Female Head of Household	46.4	47.2	38.8
Weekly Average Hours Viewing per TVHH	40.26	41.83	44.05
Weekly Average Number of Channels Viewed per TVHH	3.8	6.9	8.0
PERSONS			
Number of Persons	332	435	317
Age Groups: 2 - 11	16.6%	13.3%	17.0%
12 - 17	9.9%	10.1%	12.9%
18 - 34	28.0%	25.5%	34.4%
35 - 49	17.5%	20.0%	19.2%
50 - 64	16.9%	18.6%	13.6%
65 +	11.1%	12.4%	2.8%
Weekly Average Hours Viewing per Person	23.96	25.26	24.48

TABLE II-3

Baton Rouge, LA (Market Type 5)

Descriptors of Reception Type Audiences

Reception Type	Broadcast	Basic Cable	Pay Cable
TV HOUSEHOLDS			
Number of TVHH	203	136	33
Percent of Total TVHH	54.6%	36.6%	8.9%
Average Number of Persons per TVHH	2.8	2.9	3.6
Average Age of Male Head of Household	44.5	44.3	39.1
Average Age of Female Head of Household	44.8	44.2	36.6
Weekly Average Hours Viewing per TVHH	40.90	44.02	49.81
Weekly Average Number of Channels Viewed per TVHH	3.3	5.3	7.5
PERSONS			
Number of Persons	577	399	120
Age Groups: 2 - 11	18.7%	14.5%	16.7%
12 - 17	11.1%	12.3%	20.0%
18 - 34	29.1%	29.3%	28.3%
35 - 49	15.9%	22.3%	29.2%
50 - 64	17.7%	15.8%	5.8%
65 +	7.5%	5.8%	0.0%
Weekly Average Hours Viewing per Person	24.95	25.62	22.53

TABLE II-4

Buffalo, NY (Market Type 3)

Descriptors of Reception Type Audiences

Reception Type	Broadcast	Basic Cable	Pay Cable
TV HOUSEHOLDS			
Number of TVHH	391	153	116
Percent of Total TVHH	59.2%	23.2%	17.6%
Average Number of Persons per TVHH	2.6	2.7	3.2
Average Age of Male Head of Household	47.0	50.0	41.1
Average Age of Female Head of Household	47.1	48.5	39.6
Weekly Average Hours Viewing per TVHH	43.81	48.67	51.79
Weekly Average Number of Channels Viewed per TVHH	4.1	6.0	7.6
PERSONS			
Number of Persons	1028	418	366
Age Groups: 2 - 11	14.0%	11.5%	17.2%
12 - 17	9.6%	11.0%	11.2%
18 - 34	27.6%	23.0%	36.3%
35 - 49	20.5%	20.3%	19.9%
50 - 64	14.7%	23.4%	11.5%
65 +	13.5%	10.8%	3.8%
Weekly Average Hours Viewing per Person	26.13	28.49	27.65

TABLE II-5

Chicago, IL (Market Type 1)

Descriptors of Reception Type Audiences

Reception Type	Broadcast	Basic Cable	Pay Cable
TV HOUSEHOLDS			
Number of TVHH	1500	71	97
Percent of Total TVHH	89.9%	4.3%	5.8%
Average Number of Persons per TVHH	2.8	2.7	3.2
Average Age of Male Head of Household	45.0	42.3	40.4
Average Age of Female Head of Household	44.0	41.0	39.2
Weekly Average Hours Viewing per TVHH	41.23	46.54	54.92
Weekly Average Number of Channels Viewed per TVHH	5.0	6.5	8.4
PERSONS			
Number of Persons	4211	191	310
Age Groups: 2 - 11	16.0%	21.5%	23.5%
12 - 17	10.3%	5.2%	10.3%
18 - 34	30.2%	38.7%	30.6%
35 - 49	20.4%	12.0%	23.2%
50 - 64	15.6%	14.7%	9.4%
65 +	7.4%	7.9%	2.9%
Weekly Average Hours Viewing per Person	24.59	28.73	29.53

TABLE II-6

Chico-Redding, CA (Market Type 8)

Descriptors of Reception Type Audiences

Reception Type	Broadcast	Basic Cable	Pay Cable
TV HOUSEHOLDS			
Number of TVHH	157	109	48
Percent of Total TVHH	50.0%	34.7%	15.3%
Average Number of Persons per TVHH	2.6	2.1	2.8
Average Age of Male Head of Household	50.7	51.5	39.3
Average Age of Female Head of Household	48.5	51.9	38.7
Weekly Average Hours Viewing per TVHH	43.24	44.29	48.58
Weekly Average Number of Channels Viewed per TVHH	3.5	6.6	8.0
PERSONS			
Number of Persons	408	229	135
Age Groups: 2 - 11	11.5%	6.6%	13.3%
12 - 17	10.0%	5.2%	11.9%
18 - 34	24.8%	23.1%	34.1%
35 - 49	18.1%	18.3%	26.7%
50 - 64	19.6%	26.6%	14.1%
65 +	15.9%	20.1%	0.0%
Weekly Average Hours Viewing per Person	27.75	30.61	26.87

TABLE II-7

Colorado Springs-Pueblo, CO (Market Type 4)

Descriptors of Reception Type Audiences

Reception Type	Broadcast	Basic Cable	Pay Cable
TV HOUSEHOLDS			
Number of TVHH	264	52	67
Percent of Total TVHH	68.9%	13.6%	17.5%
Average Number of Persons per TVHH	2.7	2.6	3.1
Average Age of Male Head of Household	45.6	49.1	42.3
Average Age of Female Head of Household	44.0	48.7	39.5
Weekly Average Hours Viewing per TVHH	43.78	48.71	50.06
Weekly Average Number of Channels Viewed per TVHH	3.3	5.7	6.8
PERSONS			
Number of Persons	715	137	210
Age Groups: 2 - 11	16.2%	16.8%	15.2%
12 - 17	11.2%	6.6%	14.3%
18 - 34	27.6%	24.1%	31.9%
35 - 49	20.3%	17.5%	23.8%
50 - 64	16.4%	19.7%	11.9%
65 +	8.4%	15.3%	2.9%
Weekly Average Hours Viewing per Person	26.77	30.58	28.22

TABLE II-8

Dallas-Ft. Worth, TX (Market Type 1)

Descriptors of Reception Type Audiences

Reception Type	Broadcast	Basic Cable	Pay Cable
TV HOUSEHOLDS			
Number of TVHH	859	123	109
Percent of Total TVHH	78.7%	11.3%	10.0%
Average Number of Persons per TVHH	2.5	2.4	3.0
Average Age of Male Head of Household	44.9	47.5	38.7
Average Age of Female Head of Household	44.6	47.8	36.6
Weekly Average Hours Viewing per TVHH	43.67	42.67	49.87
Weekly Average Number of Channels Viewed per TVHH	4.9	5.7	8.1
PERSONS			
Number of Persons	2173	301	325
Age Groups: 2 - 11	14.0%	14.3%	18.5%
12 - 17	9.4%	8.3%	8.9%
18 - 34	29.2%	26.2%	37.5%
35 - 49	21.4%	18.6%	24.9%
50 - 64	16.6%	19.3%	8.6%
65 +	9.4%	13.3%	1.5%
Weekly Average Hours Viewing per Person	27.48	26.43	28.49

TABLE II-9

Ft. Myers-Naples, FL (Market Type 6)

Descriptors of Reception Type Audiences

Reception Type	Broadcast	Basic Cable	Pay Cable
TV HOUSEHOLDS			
Number of TVHH	145	134	36
Percent of Total TVHH	46.0%	42.5%	11.4%
Average Number of Persons per TVHH	2.1	2.1	2.8
Average Age of Male Head of Household	59.6	62.7	50.9
Average Age of Female Head of Household	58.4	61.2	47.6
Weekly Average Hours Viewing per TVHH	36.75	42.11	52.08
Weekly Average Number of Channels Viewed per TVHH	3.3	5.7	7.5
PERSONS			
Number of Persons	307	282	102
Age Groups: 2 - 11	3.6%	4.6%	14.7%
12 - 17	5.9%	6.4%	8.8%
18 - 34	9.1%	4.6%	20.6%
35 - 49	14.7%	12.4%	10.6%
50 - 64	29.0%	27.3%	26.5%
65 +	37.8%	44.7%	9.8%
Weekly Average Hours Viewing per Person	27.03	32.33	28.73

TABLE II-10

Greensboro-Winston-Salem-High Point, NC (Market Type 2)

Descriptors of Reception Type Audiences

Reception Type	Broadcast	Basic Cable	Pay Cable
TV HOUSEHOLDS			
Number of TVHH	416	94	68
Percent of Total TVHH	72.0%	16.3%	11.8%
Average Number of Persons per TVHH	2.6	2.3	2.8
Average Age of Male Head of Household	46.1	51.2	42.6
Average Age of Female Head of Household	46.1	50.8	40.4
Weekly Average Hours Viewing per TVHH	46.07	46.63	47.71
Weekly Average Number of Channels Viewed per TVHH	4.6	6.5	7.4
PERSONS			
Number of Persons	1098	216	193
Age Groups: 2 - 11	12.5%	11.1%	16.1%
12 - 17	10.0%	4.6%	10.9%
18 - 34	24.0%	20.4%	28.5%
35 - 49	24.3%	21.8%	25.9%
50 - 64	19.5%	27.8%	14.5%
65 +	9.7%	14.4%	4.1%
Weekly Average Hours Viewing per Person	28.69	31.14	26.00

TABLE II-11

Greenville-New Bern-Washington, NC (Market Type 4)

Descriptors of Reception Type Audiences

Reception Type	Broadcast	Basic Cable	Pay Cable
TV HOUSEHOLDS			
Number of TVHH	331	65	93
Percent of Total TVHH	67.7%	13.3%	19.0%
Average Number of Persons per TVHH	2.7	2.8	3.0
Average Age of Male Head of Household	47.0	44.6	41.0
Average Age of Female Head of Household	48.5	45.9	39.8
Weekly Average Hours Viewing per TVHH	45.27	40.93	48.13
Weekly Average Number of Channels Viewed per TVHH	3.7	5.7	7.8
PERSONS			
Number of Persons	910	182	279
Age Groups: 2 - 11	14.6%	18.1%	17.2%
12 - 17	10.9%	9.9%	11.1%
18 - 34	22.1%	22.0%	30.5%
35 - 49	23.1%	24.7%	25.8%
50 - 64	17.4%	17.0%	12.9%
65 +	12.0%	8.2%	2.5%
Weekly Average Hours Viewing per Person	28.17	23.56	25.98

TABLE II-12

Lansing, MI (Market Type 8)

Descriptors of Reception Type Audiences

Reception Type	Broadcast	Basic Cable	Pay Cable
TV HOUSEHOLDS			
Number of TVHH	244	105	63
Percent of Total TVHH	59.2%	25.5%	15.3%
Average Number of Persons per TVHH	2.8	2.4	2.9
Average Age of Male Head of Household	43.2	44.7	40.7
Average Age of Female Head of Household	43.8	45.6	37.8
Weekly Average Hours Viewing per TVHH	41.24	39.11	45.72
Weekly Average Number of Channels Viewed per TVHH	4.4	6.6	8.0
PERSONS			
Number of Persons	688	253	185
Age Groups: 2 - 11	16.7%	12.6%	9.2%
12 - 17	12.6%	9.5%	14.1%
18 - 34	30.4%	27.7%	39.5%
35 - 49	19.3%	23.3%	23.2%
50 - 64	12.4%	17.0%	13.5%
65 +	8.6%	9.9%	0.5%
Weekly Average Hours Viewing per Person	23.57	23.22	25.67

TABLE II-13

Lexington, KY (Market Type 7)

Descriptors of Reception Type Audiences

Reception Type	Broadcast	Basic Cable	Pay Cable
TV HOUSEHOLDS			
Number of TVHH	251	137	68
Percent of Total TVHH	55.0%	30.0%	14.9%
Average Number of Persons per TVHH	2.8	2.8	3.0
Average Age of Male Head of Household	46.3	48.6	40.5
Average Age of Female Head of Household	45.2	45.3	38.2
Weekly Average Hours Viewing per TVHH	43.89	44.74	53.83
Weekly Average Number of Channels Viewed per TVHH	3.4	5.4	7.4
PERSONS			
Number of Persons	699	383	204
Age Groups: 2 - 11	17.7%	12.5%	15.2%
12 - 17	8.3%	11.0%	10.8%
18 - 34	29.0%	25.6%	33.3%
35 - 49	19.9%	21.4%	27.9%
50 - 64	15.3%	20.4%	12.3%
65 +	9.7%	9.1%	0.5%
Weekly Average Hours Viewing per Person	27.35	29.24	30.82

TABLE II-14

Madison, WI (Market Type 6)

Descriptors of Reception Type Audiences

Reception Type	Broadcast	Basic Cable	Pay Cable
TV HOUSEHOLDS			
Number of TVHH	255	39	51
Percent of Total TVHH	73.9%	11.3%	14.8%
Average Number of Persons per TVHH	2.6	2.5	2.6
Average Age of Male Head of Household	45.2	41.4	39.7
Average Age of Female Head of Household	44.5	37.9	37.3
Weekly Average Hours Viewing per TVHH	36.09	40.42	39.51
Weekly Average Number of Channels Viewed per TVHH	3.8	5.6	6.7
PERSONS			
Number of Persons	673	98	134
Age Groups: 2 - 11	12.8%	8.2%	13.4%
12 - 17	12.5%	9.2%	8.2%
18 - 34	30.2%	39.8%	42.5%
35 - 49	21.1%	24.5%	18.7%
50 - 64	11.9%	14.3%	14.9%
65 +	11.6%	4.1%	2.2%
Weekly Average Hours Viewing per Person	21.59	23.19	22.95

TABLE II-15

Memphis, TN (Market Type 3)

Descriptors of Reception Type Audiences

Reception Type	Broadcast	Basic Cable	Pay Cable
TV HOUSEHOLDS			
Number of TVHH	480	100	89
Percent of Total TVHH	71.7%	14.9%	13.3%
Average Number of Persons per TVHH	2.8	2.7	3.0
Average Age of Male Head of Household	46.2	48.1	40.1
Average Age of Female Head of Household	47.1	49.3	40.5
Weekly Average Hours Viewing per TVHH	47.11	45.85	50.09
Weekly Average Number of Channels Viewed per TVHH	3.9	6.1	7.6
PERSONS			
Number of Persons	1337	268	267
Age Groups: 2 - 11	15.0%	17.5%	16.5%
12 - 17	12.3%	8.2%	12.0%
18 - 34	24.1%	22.8%	37.5%
35 - 49	21.0%	16.0%	18.7%
50 - 64	17.3%	22.4%	12.4%
65 +	10.3%	13.1%	3.0%
Weekly Average Hours Viewing per Person	29.94	28.84	27.74

TABLE II-16

Philadelphia, PA (Market Type 2)

Descriptors of Reception Type Audiences

Reception Type	Broadcast	Basic Cable	Pay Cable
TV HOUSEHOLDS			
Number of TVHH	938	225	209
Percent of Total TVHH	68.4%	16.4%	15.2%
Average Number of Persons per TVHH	2.7	2.8	3.2
Average Age of Male Head of Household	46.0	48.9	42.7
Average Age of Female Head of Household	45.1	48.0	40.5
Weekly Average Hours Viewing per TVHH	43.00	45.09	52.54
Weekly Average Number of Channels Viewed per TVHH	5.3	7.3	8.5
PERSONS			
Number of Persons	2524	621	661
Age Groups: 2 - 11	14.9%	10.3%	15.7%
12 - 17	10.6%	12.4%	12.9%
18 - 34	27.2%	25.0%	29.5%
35 - 49	20.6%	20.0%	22.8%
50 - 64	17.3%	21.1%	15.7%
65 +	9.4%	11.3%	3.3%
Weekly Average Hours Viewing per Person	25.68	26.63	28.02

TABLE II-17

Portland-Poland Springs, ME (Market Type 4)

Descriptors of Reception Type Audiences

Reception Type	Broadcast	Basic Cable	Pay Cable
TV HOUSEHOLDS			
Number of TVHH	299	159	69
Percent of Total TVHH	56.7%	30.2%	13.1%
Average Number of Persons per TVHH	2.7	2.7	3.1
Average Age of Male Head of Household	46.6	47.4	39.4
Average Age of Female Head of Household	46.1	46.5	39.0
Weekly Average Hours Viewing per TVHH	41.87	50.26	49.95
Weekly Average Number of Channels Viewed per TVHH	3.5	6.6	7.2
PERSONS			
Number of Persons	819	431	213
Age Groups: 2 - 11	16.4%	13.2%	17.4%
12 - 17	9.5%	10.0%	10.8%
18 - 34	27.1%	26.2%	34.3%
35 - 49	17.6%	20.9%	25.4%
50 - 64	18.3%	19.0%	10.8%
65 +	11.1%	10.7%	1.4%
Weekly Average Hours Viewing per Person	25.17	28.64	26.29

TABLE II-18

Portland, OR (Market Type 1)

Descriptors of Reception Type Audiences

Reception Type	Broadcast	Basic Cable	Pay Cable
TV HOUSEHOLDS			
Number of TVHH	576	121	51
Percent of Total TVHH	77.0%	16.2%	6.8%
Average Number of Persons per TVHH	2.5	2.4	3.1
Average Age of Male Head of Household	46.2	50.6	42.2
Average Age of Female Head of Household	45.9	50.1	38.9
Weekly Average Hours Viewing per TVHH	43.49	45.48	54.91
Weekly Average Number of Channels Viewed per TVHH	4.2	6.1	7.5
PERSONS			
Number of Persons	1436	291	160
Age Groups: 2 - 11	16.0%	10.0%	16.9%
12 - 17	7.4%	9.6%	11.2%
18 - 34	28.1%	20.3%	31.9%
35 - 49	20.4%	21.3%	26.2%
50 - 64	17.8%	23.7%	10.0%
65 +	11.3%	15.1%	3.7%
Weekly Average Hours Viewing per Person	27.23	29.45	28.18

TABLE II-19

San Antonio, TX (Market Type 3)

Descriptors of Reception Type Audiences

Reception Type	Broadcast	Basic Cable	Pay Cable
TV HOUSEHOLDS			
Number of TVHH	383	106	137
Percent of Total TVHH	61.2%	16.9%	21.9%
Average Number of Persons per TVHH	2.7	2.7	3.3
Average Age of Male Head of Household	50.4	51.7	42.7
Average Age of Female Head of Household	49.3	50.0	41.2
Weekly Average Hours Viewing per TVHH	39.46	45.95	51.05
Weekly Average Number of Channels Viewed per TVHH	3.2	4.9	7.5
PERSONS			
Number of Persons	1025	287	453
Age Groups: 2 - 11	15.3%	13.6%	20.1%
12 - 17	9.9%	10.1%	11.7%
18 - 34	24.2%	21.3%	29.8%
35 - 49	16.5%	17.4%	21.6%
50 - 64	18.0%	22.3%	13.2%
65 +	16.1%	15.3%	3.5%
Weekly Average Hours Viewing per Person	24.09	28.04	27.24

TABLE II-20

Savannah, GA (Market Type 5)

Descriptors of Reception Type Audiences

Reception Type	Broadcast	Basic Cable	Pay Cable
TV HOUSEHOLDS			
Number of TVHH	244	79	91
Percent of Total TVHH	58.9%	19.1%	22.0%
Average Number of Persons per TVHH	2.7	2.9	2.9
Average Age of Male Head of Household	48.3	50.7	41.7
Average Age of Female Head of Household	46.5	50.3	40.5
Weekly Average Hours Viewing per TVHH	42.28	44.03	48.46
Weekly Average Number of Channels Viewed per TVHH	3.3	5.4	6.5
PERSONS			
Number of Persons	654	227	262
Age Groups: 2 - 11	15.7%	13.2%	12.6%
12 - 17	10.7%	11.5%	14.1%
18 - 34	25.1%	20.7%	32.1%
35 - 49	19.7%	19.8%	25.2%
50 - 64	18.0%	25.1%	13.0%
65 +	10.7%	9.7%	3.1%
Weekly Average Hours Viewing per Person	26.21	23.82	29.52

TABLE II-21

Sioux City, IA (Market Type 5)

Descriptors of Reception Type Audiences

Reception Type	Broadcast	Basic Cable	Pay Cable
TV HOUSEHOLDS			
Number of TVHH	267	46	59
Percent of Total TVHH	71.8%	12.4%	15.9%
Average Number of Persons per TVHH	2.7	2.2	3.5
Average Age of Male Head of Household	49.4	53.6	39.6
Average Age of Female Head of Household	48.2	53.4	40.0
Weekly Average Hours Viewing per TVHH	40.72	39.42	53.65
Weekly Average Number of Channels Viewed per TVHH	3.9	5.9	8.2
PERSONS			
Number of Persons	722	101	206
Age Groups: 2 - 11	15.1%	8.9%	20.9%
12 - 17	11.1%	3.0%	18.4%
18 - 34	23.4%	15.8%	24.3%
35 - 49	17.5%	16.8%	26.7%
50 - 64	17.3%	28.7%	9.2%
65 +	15.7%	26.7%	0.5%
Weekly Average Hours Viewing per Person	25.04	26.31	27.83

TABLE II-22

Springfield, MA (Market Type 8)

Descriptors of Reception Type Audiences

Reception Type	Broadcast	Basic Cable	Pay Cable
TV HOUSEHOLDS			
Number of TVHH	255	96	67
Percent of Total TVHH	61.0%	23.0%	16.0%
Average Number of Persons per TVHH	2.4	2.7	3.1
Average Age of Male Head of Household	47.3	50.1	40.6
Average Age of Female Head of Household	48.1	50.2	39.5
Weekly Average Hours Viewing per TVHH	39.27	44.72	52.69
Weekly Average Number of Channels Viewed per TVHH	4.2	6.6	8.6
PERSONS			
Number of Persons	624	263	206
Age Groups: 2 - 11	12.8%	11.8%	17.0%
12 - 17	8.8%	12.5%	9.7%
18 - 34	29.3%	18.3%	39.8%
35 - 49	17.1%	23.6%	21.8%
50 - 64	17.1%	19.8%	7.8%
65 +	14.7%	14.1%	3.9%
Weekly Average Hours Viewing per Person	25.15	25.35	27.21

TABLE II-23

Tulsa, OK (Market Type 2)

Descriptors of Reception Type Audiences

Reception Type	Broadcast	Basic Cable	Pay Cable
TV HOUSEHOLDS			
Number of TVHH	316	103	108
Percent of Total TVHH	60.0%	19.5%	20.5%
Average Number of Persons per TVHH	2.5	2.3	2.9
Average Age of Male Head of Household	48.5	48.3	40.3
Average Age of Female Head of Household	47.8	48.5	39.6
Weekly Average Hours Viewing per TVHH	44.23	46.98	45.30
Weekly Average Number of Channels Viewed per TVHH	4.0	6.4	8.4
PERSONS			
Number of Persons	781	236	318
Age Groups: 2 - 11	14.6%	8.9%	14.5%
12 - 17	8.1%	6.8%	14.8%
18 - 34	22.9%	22.9%	29.2%
35 - 49	17.9%	19.1%	30.5%
50 - 64	22.9%	30.5%	7.2%
65 +	13.6%	11.9%	3.8%
Weekly Average Hours Viewing per Person	29.06	31.15	27.30

TABLE II-24

Youngstown, OH (Market Type 7)

Descriptors of Reception Type Audiences

Reception Type	Broadcast	Basic Cable	Pay Cable
TV HOUSEHOLDS			
Number of TVHH	271	62	93
Percent of Total TVHH	63.6%	14.6%	21.8%
Average Number of Persons per TVHH	2.8	2.4	3.0
Average Age of Male Head of Household	48.5	51.4	40.7
Average Age of Female Head of Household	48.3	51.4	40.7
Weekly Average Hours Viewing per TVHH	46.79	44.66	54.80
Weekly Average Number of Channels Viewed per TVHH	4.6	6.3	8.2
PERSONS			
Number of Persons	747	148	281
Age Groups: 2 - 11	15.4%	12.8%	18.5%
12 - 17	9.4%	7.4%	10.7%
18 - 34	24.8%	23.6%	35.9%
35 - 49	18.6%	14.9%	17.4%
50 - 64	19.9%	25.7%	15.3%
65 +	11.9%	15.5%	2.1%
Weekly Average Hours Viewing per Person	28.30	28.66	30.71

Station Audiences

This section of the results describes, in general terms, the impact that cable and pay cable have had on different types of stations. Tables III-1 thru III-32 present the average weekly shares, average weekly prime time shares and average weekly circulation of local stations across reception types. For each of the eight market types, share and circulation figures are reported for television households, men 18 to 49, women 18 to 49 and adults 50 and older. The average market shares reported in these tables may not total to 100 due to rounding error and the omission of unidentified viewing reported in the diaries.

Market Type 1. This market type combined the results from Chicago, Dallas-Ft. Worth and Portland, Oregon. Each of these markets had four commercial VHF stations and one or more commercial UHF stations.

Among TVHH's, there was a "stepwise" reduction in local station weekly shares from broadcast to basic cable to pay cable homes. In absolute terms, the local affiliates had the greatest reduction in weekly audiences, going from a combined weekly share of 71.7 in broadcast homes to 51.2 in pay cable homes. Average prime time shares generally showed the same pattern of results across reception types. The average weekly circulation of local stations, particularly the VHF stations, did not appear to

be adversely affected by cable and pay cable competition. For men 18 to 49, women 18-49 and the older adults the reductions in local station shares across reception types appeared to follow basically the same pattern as in TVHH's. These reductions were most pronounced, however, among males 18-49 in pay cable homes. This group spent almost 26% of its prime time viewing tuned to a pay cable channel like HBO or Showtime.

Market Type 2. This market type combined the results from Tulsa, Philadelphia and Greensboro-Winston Salem-High Point. Each of these markets had three VHF affiliates and two or more UHF independents.

Among TVHH's, the VHF affiliates evidenced the greatest reduction in weekly audience shares going from 79.8 in broadcast homes to 56.1 in pay cable homes. While the UHF independents showed some slippage, it was modest by comparison. Network shares were also smaller in cable and pay cable homes during prime time. Independent shares, however were slightly higher among these reception types. For both VHF and UHF stations, weekly circulation was higher among the non-broadcast reception types.

The results for various demographic subsets of the audience were again much like those for TVHH's. Men 18 to 49 in pay cable homes were, however, more likely to watch a pay channel during prime time than other pay subscribers.

Market Type 3. This market type combined the results from Buffalo, Memphis and San Antonio. Each of these markets had three VHF affiliates and one UHF independent.

The combined average weekly shares for network affiliates dropped from 84.4 in broadcast homes to 70.8 in basic cable homes to 57.6 in pay cable homes. In relative terms, the local UHF independent evidenced a similar slippage in weekly shares. Prime time viewing presented much the same picture, with over a third of all TV watching in pay cable homes being of something other than a local station. The circulation of all local stations, and especially the local independents, was highest in pay cable households. The results for demographic subsets of the audience showed the same overall pattern, however, reductions in local station shares were particularly pronounced among men 18 to 49.

Market Type 4. This market type combined the results from Colorado Springs-Pueblo, Greenville-New Bern-Washington and Portland, Maine. Each of these markets had three VHF affiliates.

As in the first three market types, the average weekly shares and average prime time shares of the local VHF affiliates were smaller in basic cable homes than broadcast homes and smaller still in pay cable homes. Indeed, in pay cable households 46 percent of all the time spent viewing was of something other than a local

station. The weekly circulation of local stations, however, was highest among pay cable households. As in other markets, pay cable channels made their greatest inroads among men 18-49.

Market Type 5. This market type combined the results from Savannah, Sioux City and Baton Rouge. Each of these markets had 2 VHF affiliates and 1 UHF affiliate.

The combined average weekly shares of the VHF affiliates evidenced a substantial decline across reception types, going from 71.7 in broadcast households to 38.5 in pay cable households. The UHF affiliate weekly shares were also smaller in pay cable homes, but that reduction was minor in comparison. Weekly prime time shares exhibited basically the same pattern across reception types. The weekly TVHH circulation of VHF affiliates was essentially unchanged across reception types. UHF affiliate circulation increased across reception types, with highest circulation among pay cable homes. Among demographic subsets of the audience, results were much the same. As in other markets, pay cable channels had their highest shares among men 18-49.

Market Type 6. This market type combined the results from Austin, Madison and Ft. Myers-Naples. Each of these markets had one VHF affiliate and two UHF affiliates.

The average VHF affiliate in these markets had a 50 percent reduction in weekly TVHH shares from broadcast to

pay cable households. There was very little difference in UHF affiliate shares between broadcast and basic cable homes, but an appreciable decline in shares among pay cable homes. VHF affiliate weekly TVHH circulation was slightly lower in non-broadcast homes. UHF circulation, however, was higher among these reception types. Within demographic subsets of the audiences, viewing of non-market sources was highest among men 18-49. Pay cable viewers in this group spent nearly half of their total viewing time with non-market sources and almost 30 percent of their prime time viewing with pay cable channels.

Market Type 7. This market type combined the results from Lexington, Bakersfield and Youngstown. Each of these markets had three UHF affiliates.

The local UHF affiliates in these markets had the same "stepwise" reduction in weekly audience shares evident in other market types. In fact, with the exception of substantial distant station viewing in broadcast homes, these results look very much like those in markets with three VHF affiliates (Market Type 4). Cable subscription did not appear to have an adverse effect on station circulation. Indeed, the weekly TVHH circulation of these stations was slightly higher among non-broadcast households. As in other markets, pay channel shares were largest during prime time, especially among men 18-49.

Market Type 8. This market type combined the results from Lansing, Chico-Redding and Springfield, Massachusetts. Each of these markets had two local affiliates. For this analysis, no distinction was made between UHF and VHF stations.

The combined weekly TVHH shares of the local affiliates dropped from 63.1 in broadcast homes to 37.2 in pay cable homes. Over 60 percent of all household viewing in pay cable homes was of something other than a local station. As in other markets, however, the weekly TVHH circulation of local stations was actually higher among non-broadcast homes. Pay cable channels again achieved their highest audience shares during prime time, especially among men 18 to 49.

TABLE III-1

Market Type 1 (4 VHF / 1+ UHF)

Weekly Station Use Among TVHH

Reception Type	Broadcast	Basic Cable	Pay Cable
AVERAGE WEEKLY SHARES			
Local VHF Affiliates	71.7	61.1	51.2
Local VHF Independents	13.9	10.5	10.3
Local UHF Independents	6.7	6.5	5.4
Local ETVs	3.3	3.1	2.3
TOTAL LOCAL STATIONS	95.7	81.3	69.3
Distant Stations	4.0	13.5	9.5
Pay Cable Channels			17.1
Other Cable Only Channels		4.7	3.6
TOTAL NON-MARKET SOURCES	4.0	18.3	30.3
AVERAGE WEEKLY PRIME TIME SHARES			
Local VHF Affiliates	79.3	68.0	58.6
Local VHF Independents	9.2	9.4	6.6
Local UHF Independents	2.4	2.2	1.1
Local ETVs	4.5	2.6	2.4
TOTAL LOCAL STATIONS	95.4	82.3	68.8
Distant Stations	4.3	15.6	6.0
Pay Cable Channels			22.1
Other Cable Only Channels		1.8	2.8
TOTAL NON-MARKET SOURCES	4.3	17.4	30.9
AVERAGE WEEKLY CIRCULATION			
Local VHF Affiliates	91.7	89.4	92.8
Local VHF Independents	61.0	59.6	62.9
Local UHF Independents	19.9	16.8	17.1

TABLE III-2

Market Type 1 (4 VHF / 1+ UHF)

Weekly Station Use Among Men 18-49

Reception Type	Broadcast	Basic Cable	Pay Cable
AVERAGE WEEKLY SHARES			
Local VHF Affiliates	69.9	60.8	46.9
Local VHF Independents	15.6	12.3	11.3
Local UHF Independents	7.1	5.2	3.1
Local ETVs	2.7	1.3	1.2
TOTAL LOCAL STATIONS	95.4	79.7	62.6
Distant Stations	4.2	18.3	10.3
Pay Cable Channels			22.3
Other Cable Only Channels		1.5	4.0
TOTAL NON-MARKET SOURCES	4.2	19.8	36.7
AVERAGE WEEKLY PRIME TIME SHARES			
Local VHF Affiliates	78.5	69.4	51.9
Local VHF Independents	10.0	10.4	8.2
Local UHF Independents	2.4	1.3	1.0
Local ETVs	4.1	1.8	1.9
TOTAL LOCAL STATIONS	95.1	83.0	63.1
Distant Stations	4.3	15.4	6.4
Pay Cable Channels			25.9
Other Cable Only Channels		1.5	4.1
TOTAL NON-MARKET SOURCES	4.3	16.9	36.5
AVERAGE WEEKLY CIRCULATION			
Local VHF Affiliates	84.4	80.2	84.6
Local VHF Independents	71.0	69.3	71.1
Local UHF Independents	15.1	13.3	9.6

TABLE III-3

Market Type 1 (4 VHF / 1+ UHF)

Weekly Station Use Among Women 18-49

Reception Type	Broadcast	Basic Cable	Pay Cable
AVERAGE WEEKLY SHARES			
Local VHF Affiliates	75.5	65.5	57.2
Local VHF Independents	12.3	10.0	9.0
Local UHF Independents	5.9	5.1	3.4
Local ETVs	2.1	1.1	1.5
TOTAL LOCAL STATIONS	96.1	81.8	71.1
Distant Stations	3.6	17.1	8.9
Pay Cable Channels			17.4
Other Cable Only Channels		.8	2.1
TOTAL NON-MARKET SOURCES	3.6	18.0	28.5
AVERAGE WEEKLY PRIME TIME SHARES			
Local VHF Affiliates	84.2	75.2	62.9
Local VHF Independents	6.5	7.4	5.8
Local UHF Independents	2.1	1.5	1.1
Local ETVs	3.3	1.0	2.1
TOTAL LOCAL STATIONS	96.2	85.2	71.9
Distant Stations	3.4	13.8	4.9
Pay Cable Channels			21.2
Other Cable Only Channels		.5	1.7
TOTAL NON-MARKET SOURCES	3.4	14.4	27.9
AVERAGE WEEKLY CIRCULATION			
Local VHF Affiliates	87.9	85.2	89.2
Local VHF Independents	70.6	68.7	72.3
Local UHF Independents	15.4	14.3	12.4

TABLE III-4

Market Type 1 (4 VHF / 1+ UHF)

Weekly Station Use Among Adults 50 and Older

Reception Type	Broadcast	Basic Cable	Pay Cable
AVERAGE WEEKLY SHARES			
Local VHF Affiliates	78.4	67.9	58.1
Local VHF Independents	10.0	8.3	7.8
Local UHF Independents	3.0	3.8	2.4
Local ETVs	3.3	2.0	1.8
TOTAL LOCAL STATIONS	94.7	82.1	70.2
Distant Stations	5.1	15.6	9.4
Pay Cable Channels			14.6
Other Cable Only Channels		1.6	5.6
TOTAL NON-MARKET SOURCES	5.1	17.2	29.7
AVERAGE WEEKLY PRIME TIME SHARES			
Local VHF Affiliates	75.6	62.7	55.5
Local VHF Independents	11.3	11.6	9.1
Local UHF Independents	1.9	3.6	1.6
Local ETVs	5.8	3.7	3.4
TOTAL LOCAL STATIONS	94.7	81.7	69.7
Distant Stations	5.1	15.9	7.3
Pay Cable Channels			20.3
Other Cable Only Channels		2.3	2.5
TOTAL NON-MARKET SOURCES	5.1	18.2	30.2
AVERAGE WEEKLY CIRCULATION			
Local VHF Affiliates	89.0	86.2	91.2
Local VHF Independents	67.3	70.3	72.8
Local UHF Independents	10.5	10.4	12.5

TABLE III-5

Market Type 2 (3 VHF / 2+ UHF)

Weekly Station Use Among TVHH

Reception Type	Broadcast	Basic Cable	Pay Cable
AVERAGE WEEKLY SHARES			
Local VHF Affiliates	79.8	68.5	56.1
Local UHF Independents	8.8	8.4	8.3
Local ETVs	.7	.7	.3
TOTAL LOCAL STATIONS	89.4	77.6	64.8
Distant Stations	10.4	18.3	16.7
Pay Cable Channels			15.3
Other Cable Only Channels		3.3	2.5
TOTAL NON-MARKET SOURCES	10.4	21.7	34.5
AVERAGE WEEKLY PRIME TIME SHARES			
Local VHF Affiliates	83.4	73.5	58.3
Local UHF Independents	5.1	6.2	5.4
Local ETVs	.8	1.1	.3
TOTAL LOCAL STATIONS	89.4	80.9	64.0
Distant Stations	10.3	15.7	12.0
Pay Cable Channels			21.3
Other Cable Only Channels		2.8	2.4
TOTAL NON-MARKET SOURCES	10.3	18.5	35.7
AVERAGE WEEKLY CIRCULATION			
Local VHF Affiliates	91.3	93.0	92.4
Local UHF Independents	26.3	30.9	26.8

TABLE III-6

Market Type 2 (3 VHF / 2+ UHF)

Weekly Station Use Among Men 18-49

Reception Type	Broadcast	Basic Cable	Pay Cable
AVERAGE WEEKLY SHARES			
Local VHF Affiliates	78.7	65.4	51.7
Local UHF Independents	11.3	10.3	8.6
Local ETVs	.6	.2	.1
TOTAL LOCAL STATIONS	90.6	75.9	60.5
Distant Stations	9.2	21.2	16.0
Pay Cable Channels			19.7
Other Cable Only Channels		2.1	3.0
TOTAL NON-MARKET SOURCES	9.2	23.4	38.8
AVERAGE WEEKLY PRIME TIME SHARES			
Local VHF Affiliates	82.0	72.8	54.5
Local UHF Independents	7.7	7.5	5.4
Local ETVs	.8	.3	.1
TOTAL LOCAL STATIONS	90.6	80.7	60.1
Distant Stations	9.1	15.6	10.5
Pay Cable Channels			25.5
Other Cable Only Channels		2.8	3.3
TOTAL NON-MARKET SOURCES	9.1	18.4	39.4
AVERAGE WEEKLY CIRCULATION			
Local VHF Affiliates	86.4	85.8	83.5
Local UHF Independents	30.6	33.3	32.9

TABLE III-7

Market Type 2 (3 VHF / 2+ UHF)

Weekly Station Use Among Women 18-49

Reception Type	Broadcast	Basic Cable	Pay Cable
AVERAGE WEEKLY SHARES			
Local VHF Affiliates	80.8	68.7	59.6
Local UHF Independents	9.1	8.3	6.8
Local ETVs	.7	.4	.1
TOTAL LOCAL STATIONS	90.6	77.5	66.6
Distant Stations	9.2	20.6	14.8
Pay Cable Channels			16.7
Other Cable Only Channels		1.2	1.2
TOTAL NON-MARKET SOURCES	9.2	21.8	32.7
AVERAGE WEEKLY PRIME TIME SHARES			
Local VHF Affiliates	85.8	77.3	63.8
Local UHF Independents	4.9	5.1	4.0
Local ETVs	.8	.5	.1
TOTAL LOCAL STATIONS	91.6	83.0	67.9
Distant Stations	8.1	15.1	9.9
Pay Cable Channels			20.7
Other Cable Only Channels		1.2	1.1
TOTAL NON-MARKET SOURCES	8.1	16.4	31.7
AVERAGE WEEKLY CIRCULATION			
Local VHF Affiliates	88.2	87.7	86.6
Local UHF Independents	30.3	31.5	35.0

TABLE III-8

Market Type 2 (3 VHF / 2+ UHF)

Weekly Station Use Among Adults 50 and Older

Reception Type	Broadcast	Basic Cable	Pay Cable
AVERAGE WEEKLY SHARES			
Local VHF Affiliates	84.4	73.3	65.1
Local UHF Independents	4.5	6.4	7.0
Local ETVs	.5	.7	.8
TOTAL LOCAL STATIONS	89.4	80.5	72.9
Distant Stations	9.9	15.8	12.0
Pay Cable Channels			12.4
Other Cable Only Channels		3.0	2.0
TOTAL NON-MARKET SOURCES	9.9	18.8	26.4
AVERAGE WEEKLY PRIME TIME SHARES			
Local VHF Affiliates	82.4	71.5	56.9
Local UHF Independents	4.6	6.3	8.6
Local ETVs	1.0	1.3	1.0
TOTAL LOCAL STATIONS	88.1	79.1	66.6
Distant Stations	11.7	17.5	11.3
Pay Cable Channels			18.7
Other Cable Only Channels		2.7	2.4
TOTAL NON-MARKET SOURCES	11.7	20.3	32.5
AVERAGE WEEKLY CIRCULATION			
Local VHF Affiliates	86.8	91.3	93.9
Local UHF Independents	18.0	28.7	38.6

TABLE III-9

Market Type 3 (3 VHF / 1 UHF)

Weekly Station Use Among TVHH

Reception Type	Broadcast	Basic Cable	Pay Cable
AVERAGE WEEKLY SHARES			
Local VHF Affiliates	84.4	70.8	57.6
Local UHF Independents	6.1	4.7	4.1
Local ETVs	2.1	1.6	1.5
TOTAL LOCAL STATIONS	92.7	77.2	63.3
Distant Stations	6.9	18.9	15.1
Pay Cable Channels			18.0
Other Cable Only Channels		2.9	2.7
TOTAL NON-MARKET SOURCES	6.9	21.9	35.8
AVERAGE WEEKLY PRIME TIME SHARES			
Local VHF Affiliates	86.1	74.1	58.4
Local UHF Independents	4.0	3.6	2.5
Local ETVs	2.6	2.2	1.5
TOTAL LOCAL STATIONS	92.8	80.0	62.4
Distant Stations	6.9	16.5	9.9
Pay Cable Channels			24.5
Other Cable Only Channels		2.8	2.3
TOTAL NON-MARKET SOURCES	6.9	19.3	36.8
AVERAGE WEEKLY CIRCULATION			
Local VHF Affiliates	89.5	90.0	93.4
Local UHF Independents	35.6	39.5	47.9

TABLE III-10

Market Type 3 (3 VHF / 1 UHF)

Weekly Station Use Among Men 18-49

Reception Type	Broadcast	Basic Cable	Pay Cable
AVERAGE WEEKLY SHARES			
Local VHF Affiliates	84.8	71.2	50.8
Local UHF Independents	5.5	6.2	3.7
Local ETVs	1.3	1.1	1.0
TOTAL LOCAL STATIONS	91.7	78.6	55.5
Distant Stations	7.3	17.5	15.1
Pay Cable Channels			25.5
Other Cable Only Channels		2.6	2.8
TOTAL NON-MARKET SOURCES	7.3	20.1	43.5
AVERAGE WEEKLY PRIME TIME SHARES			
Local VHF Affiliates	86.4	73.2	50.8
Local UHF Independents	3.3	5.1	2.3
Local ETVs	1.9	1.9	1.2
TOTAL LOCAL STATIONS	91.6	80.2	54.4
Distant Stations	7.7	15.2	10.9
Pay Cable Channels			31.1
Other Cable Only Channels		3.0	2.7
TOTAL NON-MARKET SOURCES	7.7	18.3	44.7
AVERAGE WEEKLY CIRCULATION			
Local VHF Affiliates	85.4	86.9	81.9
Local UHF Independents	11.0	18.0	22.4

TABLE III-11

Market Type 3 (3 VHF / 1 UHF)

Weekly Station Use Among Women 18-49

Reception Type	Broadcast	Basic Cable	Pay Cable
AVERAGE WEEKLY SHARES			
Local VHF Affiliates	86.0	70.6	59.7
Local UHF Independents	5.7	6.3	3.7
Local ETVs	1.2	1.0	.9
TOTAL LOCAL STATIONS	92.9	78.0	64.4
Distant Stations	6.7	19.5	13.3
Pay Cable Channels			19.9
Other Cable Only Channels		1.2	1.6
TOTAL NON-MARKET SOURCES	6.7	20.8	34.8
AVERAGE WEEKLY PRIME TIME SHARES			
Local VHF Affiliates	88.1	75.9	58.3
Local UHF Independents	3.1	5.3	2.7
Local ETVs	1.7	2.0	1.2
TOTAL LOCAL STATIONS	92.9	83.2	62.2
Distant Stations	6.7	14.9	8.7
Pay Cable Channels			26.9
Other Cable Only Channels		1.0	1.5
TOTAL NON-MARKET SOURCES	6.7	15.9	37.1
AVERAGE WEEKLY CIRCULATION			
Local VHF Affiliates	86.9	87.2	86.3
Local UHF Independents	31.0	41.5	37.2

TABLE III-12

Market Type 3 (3 VHF / 1 UHF)

Weekly Station Use Among Adults 50 and Older

Reception Type	Broadcast	Basic Cable	Pay Cable
AVERAGE WEEKLY SHARES			
Local VHF Affiliates	86.1	75.0	65.2
Local UHF Independents	4.9	2.4	3.2
Local ETVs	1.8	1.2	1.2
TOTAL LOCAL STATIONS	92.9	78.6	69.7
Distant Stations	6.8	16.9	15.0
Pay Cable Channels			11.9
Other Cable Only Channels		3.7	2.6
TOTAL NON-MARKET SOURCES	6.8	20.6	29.5
AVERAGE WEEKLY PRIME TIME SHARES			
Local VHF Affiliates	85.0	72.8	63.7
Local UHF Independents	4.6	2.7	2.4
Local ETVs	3.5	2.8	1.7
TOTAL LOCAL STATIONS	93.1	78.3	67.9
Distant Stations	6.5	16.8	10.0
Pay Cable Channels			18.6
Other Cable Only Channels		3.9	2.5
TOTAL NON-MARKET SOURCES	6.5	20.8	31.2
AVERAGE WEEKLY CIRCULATION			
Local VHF Affiliates	88.3	88.0	91.3
Local UHF Independents	25.3	23.9	36.5

TABLE III-13

Market Type 4 (3 VHF)

Weekly Station Use Among TVHH

Reception Type	Broadcast	Basic Cable	Pay Cable
AVERAGE WEEKLY SHARES			
Local VHF Affiliates	86.7	65.9	52.9
Local ETVs	0.9	0.9	0.5
TOTAL LOCAL STATIONS	87.6	66.8	53.4
Distant Stations	11.9	30.9	26.9
Pay Cable Channels			17.1
Other Cable Only Channels		1.9	2.0
TOTAL NON-MARKET SOURCES	11.9	32.8	46.1
AVERAGE WEEKLY PRIME TIME SHARES			
Local VHF Affiliates	86.7	71.6	58.2
Local ETVs	1.0	1.7	0.9
TOTAL LOCAL STATIONS	87.7	73.3	59.2
Distant Stations	12.1	24.1	16.5
Pay Cable Channels			22.2
Other Cable Only Channels		2.2	1.9
TOTAL NON-MARKET SOURCES	12.1	26.3	40.7
AVERAGE WEEKLY CIRCULATION			
Local VHF Affiliates	87.0	90.6	90.9

TABLE III-14

Market Type 4 (3 VHF)

Weekly Station Use Among Men 18-49

Reception Type	Broadcast	Basic Cable	Pay Cable
AVERAGE WEEKLY SHARES			
Local VHF Affiliates	86.9	72.0	49.8
Local ETVs	0.4	1.1	0.5
TOTAL LOCAL STATIONS	87.3	73.1	50.3
Distant Stations	12.1	21.1	24.5
Pay Cable Channels			22.6
Other Cable Only Channels		5.6	2.4
TOTAL NON-MARKET SOURCES	12.1	26.6	49.2
AVERAGE WEEKLY PRIME TIME SHARES			
Local VHF Affiliates	86.4	70.5	55.7
Local ETVs	0.6	1.9	0.8
TOTAL LOCAL STATIONS	87.0	72.4	56.6
Distant Stations	12.9	22.3	15.2
Pay Cable Channels			26.2
Other Cable Only Channels		5.0	1.8
TOTAL NON-MARKET SOURCES	12.9	27.3	43.3
AVERAGE WEEKLY CIRCULATION			
Local VHF Affiliates	79.5	84.1	78.8

TABLE III-15

Market Type 4 (3 VHF)

Weekly Station Use Among Women 18-49

Reception Type	Broadcast	Basic Cable	Pay Cable
AVERAGE WEEKLY SHARES			
Local VHF Affiliates	88.4	68.9	55.3
Local ETVs	.3	.3	.3
TOTAL LOCAL STATIONS	88.8	69.2	55.6
Distant Stations	10.9	26.6	24.7
Pay Cable Channels			18.4
Other Cable Only Channels		.5	1.0
TOTAL NON-MARKET SOURCES	10.9	27.1	44.2
AVERAGE WEEKLY PRIME TIME SHARES			
Local VHF Affiliates	88.4	74.8	61.4
Local ETVs	.4	.7	.6
TOTAL LOCAL STATIONS	88.8	75.6	62.0
Distant Stations	10.1	23.5	14.7
Pay Cable Channels			22.4
Other Cable Only Channels		.7	.9
TOTAL NON-MARKET SOURCES	10.1	24.2	38.0
AVERAGE WEEKLY CIRCULATION			
Local VHF Affiliates	85.8	85.4	85.1

TABLE III-16

Market Type 4 (3 VHF)

Weekly Station Use Among Adults 50 and Older

Reception Type	Broadcast	Basic Cable	Pay Cable
AVERAGE WEEKLY SHARES			
Local VHF Affiliates	88.1	68.1	64.7
Local ETVs	.8	.9	.8
TOTAL LOCAL STATIONS	88.9	69.0	65.5
Distant Stations	10.8	28.7	17.8
Pay Cable Channels			13.9
Other Cable Only Channels		2.1	2.5
TOTAL NON-MARKET SOURCES	10.8	30.8	34.3
AVERAGE WEEKLY PRIME TIME SHARES			
Local VHF Affiliates	85.4	68.8	53.8
Local ETVs	1.7	2.0	1.8
TOTAL LOCAL STATIONS	87.1	70.8	55.7
Distant Stations	12.8	25.9	22.1
Pay Cable Channels			18.6
Other Cable Only Channels		3.1	3.5
TOTAL NON-MARKET SOURCES	12.8	29.0	44.3
AVERAGE WEEKLY CIRCULATION			
Local VHF Affiliates	84.3	86.1	85.7

TABLE III-17

Market Type 5 (2 VHF / 1 UHF)

Weekly Station Use Among TVHH

Reception Type	Broadcast	Basic Cable	Pay Cable
AVERAGE WEEKLY SHARES			
Local VHF Affiliates	71.7	52.8	38.5
Local UHF Affiliates	14.3	13.4	12.8
Local ETVs	1.7	1.6	1.4
TOTAL LOCAL STATIONS	87.8	67.9	52.8
Distant Stations	12.0	26.0	26.6
Pay Cable Channels			15.9
Other Cable Only Channels		5.5	4.0
TOTAL NON-MARKET SOURCES	12.0	31.5	46.6
AVERAGE WEEKLY PRIME TIME SHARES			
Local VHF Affiliates	70.3	55.5	42.9
Local UHF Affiliates	15.2	15.6	14.0
Local ETVs	1.8	2.7	2.3
TOTAL LOCAL STATIONS	87.3	73.8	59.2
Distant Stations	12.6	19.1	14.1
Pay Cable Channels			22.9
Other Cable Only Channels		5.6	3.4
TOTAL NON-MARKET SOURCES	12.6	24.7	40.4
AVERAGE WEEKLY CIRCULATION			
Local VHF Affiliates	93.3	92.2	92.0
Local UHF Affiliates	67.3	73.0	84.8

TABLE III-18

Market Type 5 (2 VHF / 1 UHF)

Weekly Station Use Among Men 18-49

Reception Type	Broadcast	Basic Cable	Pay Cable
AVERAGE WEEKLY SHARES			
Local VHF Affiliates	73.7	52.4	36.8
Local UHF Affiliates	14.5	12.9	11.5
Local ETVs	1.2	1.6	.9
TOTAL LOCAL STATIONS	89.4	67.0	49.3
Distant Stations	10.5	26.1	25.5
Pay Cable Channels			20.1
Other Cable Only Channels		5.8	4.3
TOTAL NON-MARKET SOURCES	10.5	32.0	50.0
AVERAGE WEEKLY PRIME TIME SHARES			
Local VHF Affiliates	68.8	51.3	35.3
Local UHF Affiliates	16.3	15.5	14.0
Local ETVs	1.0	1.8	1.3
TOTAL LOCAL STATIONS	86.1	68.6	50.7
Distant Stations	13.7	26.2	17.2
Pay Cable Channels			27.6
Other Cable Only Channels		4.0	3.6
TOTAL NON-MARKET SOURCES	13.7	30.2	48.5
AVERAGE WEEKLY CIRCULATION			
Local VHF Affiliates	91.1	86.4	81.2
Local UHF Affiliates	66.5	61.4	71.4

TABLE III-19

Market Type 5 (2 VHF / 1 UHF)

Weekly Station Use Among Women 18-49

Reception Type	Broadcast	Basic Cable	Pay Cable
AVERAGE WEEKLY SHARES			
Local VHF Affiliates	72.4	53.7	39.3
Local UHF Affiliates	15.4	13.9	13.5
Local ETVs	.7	1.3	1.0
TOTAL LOCAL STATIONS	88.5	69.0	53.9
Distant Stations	11.3	27.8	27.1
Pay Cable Channels			16.2
Other Cable Only Channels		2.3	2.4
TOTAL NON-MARKET SOURCES	11.3	30.1	45.7
AVERAGE WEEKLY PRIME TIME SHARES			
Local VHF Affiliates	71.0	57.5	39.1
Local UHF Affiliates	16.4	16.6	14.9
Local ETVs	.8	1.9	2.0
TOTAL LOCAL STATIONS	88.2	76.1	56.1
Distant Stations	11.6	20.9	18.6
Pay Cable Channels			23.2
Other Cable Only Channels		2.1	1.7
TOTAL NON-MARKET SOURCES	11.6	23.1	43.5
AVERAGE WEEKLY CIRCULATION			
Local VHF Affiliates	91.0	89.1	84.8
Local UHF Affiliates	68.6	65.5	76.4

TABLE III-20

Market Type 5 (2 VHF / 1 UHF)

Weekly Station Use Among Adults 50 and Older

Reception Type	Broadcast	Basic Cable	Pay Cable
AVERAGE WEEKLY SHARES			
Local VHF Affiliates	73.0	56.5	55.6
Local UHF Affiliates	11.2	13.5	12.4
Local ETVs	1.6	1.6	.9
TOTAL LOCAL STATIONS	85.9	71.7	69.0
Distant Stations	14.0	20.6	15.6
Pay Cable Channels			10.2
Other Cable Only Channels		6.3	4.6
TOTAL NON-MARKET SOURCES	14.0	26.8	30.4
AVERAGE WEEKLY PRIME TIME SHARES			
Local VHF Affiliates	68.2	53.7	44.5
Local UHF Affiliates	13.7	16.2	18.9
Local ETVs	2.8	3.5	2.5
TOTAL LOCAL STATIONS	84.8	73.4	65.9
Distant Stations	15.2	18.7	13.4
Pay Cable Channels			17.1
Other Cable Only Channels		7.0	3.2
TOTAL NON-MARKET SOURCES	15.2	25.7	33.7
AVERAGE WEEKLY CIRCULATION			
Local VHF Affiliates	89.2	89.8	92.6
Local UHF Affiliates	55.7	69.0	60.9

TABLE III-21

Market Type 6 (1 VHF / 2 UHF)

Weekly Station Use Among TVHH

Reception Type	Broadcast	Basic Cable	Pay Cable
AVERAGE WEEKLY SHARES			
Local VHF Affiliates	41.7	31.5	20.9
Local UHF Affiliates	44.5	45.9	35.3
Local ETVs	2.6	1.2	1.4
TOTAL LOCAL STATIONS	88.9	78.6	57.6
Distant Stations	10.6	16.5	15.8
Pay Cable Channels			19.5
Other Cable Only Channels		4.6	6.7
TOTAL NON-MARKET SOURCES	10.6	21.1	42.1
AVERAGE WEEKLY PRIME TIME SHARES			
Local VHF Affiliates	38.9	31.9	22.0
Local UHF Affiliates	46.9	46.5	38.2
Local ETVs	3.0	1.9	1.4
TOTAL LOCAL STATIONS	88.9	80.4	61.6
Distant Stations	10.6	15.1	10.6
Pay Cable Channels			24.5
Other Cable Only Channels		4.4	3.2
TOTAL NON-MARKET SOURCES	10.6	19.5	38.3
AVERAGE WEEKLY CIRCULATION			
Local VHF Affiliates	97.3	96.0	95.2
Local UHF Affiliates	84.1	91.7	92.1

TABLE III-22

Market Type 6 (1 VHF / 2 UHF)

Weekly Station Use Among Men 18-49

Reception Type	Broadcast	Basic Cable	Pay Cable
AVERAGE WEEKLY SHARES			
Local VHF Affiliates	36.6	26.3	18.5
Local UHF Affiliates	48.9	43.6	30.5
Local ETVs	3.2	1.0	1.5
TOTAL LOCAL STATIONS	88.8	71.0	50.5
Distant Stations	10.9	24.9	18.9
Pay Cable Channels			23.4
Other Cable Only Channels		3.9	6.9
TOTAL NON-MARKET SOURCES	10.9	28.8	49.3
AVERAGE WEEKLY PRIME TIME SHARES			
Local VHF Affiliates	37.2	28.5	19.0
Local UHF Affiliates	49.8	50.4	32.9
Local ETVs	3.4	.8	2.1
TOTAL LOCAL STATIONS	90.4	79.8	54.1
Distant Stations	8.2	14.6	10.4
Pay Cable Channels			29.2
Other Cable Only Channels		5.2	5.9
TOTAL NON-MARKET SOURCES	8.2	19.8	45.5
AVERAGE WEEKLY CIRCULATION			
Local VHF Affiliates	91.6	93.7	88.7
Local UHF Affiliates	82.1	89.0	77.5

TABLE III-23

Market Type 6 (1 VHF / 2 UHF)

Weekly Station Use Among Women 18-49

Reception Type	Broadcast	Basic Cable	Pay Cable
AVERAGE WEEKLY SHARES			
Local VHF Affiliates	38.1	31.2	22.5
Local UHF Affiliates	52.2	45.0	38.0
Local ETVs	1.9	.6	1.2
TOTAL LOCAL STATIONS	92.2	76.9	61.7
Distant Stations	7.4	20.3	14.6
Pay Cable Channels			20.9
Other Cable Only Channels		2.5	2.7
TOTAL NON-MARKET SOURCES	7.4	22.8	38.2
AVERAGE WEEKLY PRIME TIME SHARES			
Local VHF Affiliates	38.9	33.9	26.3
Local UHF Affiliates	52.6	50.4	41.6
Local ETVs	1.9	1.0	1.3
TOTAL LOCAL STATIONS	93.5	85.3	69.2
Distant Stations	6.1	12.3	5.4
Pay Cable Channels			23.2
Other Cable Only Channels		2.1	2.0
TOTAL NON-MARKET SOURCES	6.1	14.4	30.7
AVERAGE WEEKLY CIRCULATION			
Local VHF Affiliates	94.0	91.0	92.5
Local UHF Affiliates	83.7	86.9	85.7

TABLE III-24

Market Type 6 (1 VHF / 2 UHF)

Weekly Station Use Among Adults 50 and Older

Reception Type	Broadcast	Basic Cable	Pay Cable
AVERAGE WEEKLY SHARES			
Local VHF Affiliates	45.2	32.8	27.3
Local UHF Affiliates	40.8	45.0	37.5
Local ETVs	1.9	1.6	.7
TOTAL LOCAL STATIONS	87.9	79.5	65.6
Distant Stations	11.7	15.7	15.0
Pay Cable Channels			14.9
Other Cable Only Channels		4.7	4.4
TOTAL NON-MARKET SOURCES	11.7	20.4	34.3
AVERAGE WEEKLY PRIME TIME SHARES			
Local VHF Affiliates	38.4	31.5	26.5
Local UHF Affiliates	45.1	46.1	33.6
Local ETVs	3.6	3.6	1.1
TOTAL LOCAL STATIONS	87.2	81.2	61.3
Distant Stations	12.3	14.8	12.2
Pay Cable Channels			23.4
Other Cable Only Channels		3.9	3.0
TOTAL NON-MARKET SOURCES	12.3	18.7	38.7
AVERAGE WEEKLY CIRCULATION			
Local VHF Affiliates	95.8	93.5	92.0
Local UHF Affiliates	79.4	91.4	88.6

TABLE III-25

Market Type 7 (3 UHF)

Weekly Station Use Among TVHH

Reception Type	Broadcast	Basic Cable	Pay Cable
AVERAGE WEEKLY SHARES			
Local UHF Affiliates	78.5	63.3	52.7
Local ETVs	.4	.3	.3
TOTAL LOCAL STATIONS	78.9	63.6	53.0
Distant Stations	21.0	33.9	28.6
Pay Cable Channels			15.9
Other Cable Only Channels		1.3	2.2
TOTAL NON-MARKET SOURCES	21.0	35.1	46.7
AVERAGE WEEKLY PRIME TIME SHARES			
Local UHF Affiliates	82.7	73.0	60.9
Local ETVs	.6	.6	.3
TOTAL LOCAL STATIONS	83.4	73.6	61.3
Distant Stations	16.3	23.5	15.9
Pay Cable Channels			20.3
Other Cable Only Channels		2.2	2.2
TOTAL NON-MARKET SOURCES	16.3	25.7	38.4
AVERAGE WEEKLY CIRCULATION			
Local UHF Affiliates	87.4	88.3	91.5

TABLE III-26

Market Type 7 (3 UHF)

Weekly Station Use Among Men 18-49

Reception Type	Broadcast	Basic Cable	Pay Cable
AVERAGE WEEKLY SHARES			
Local UHF Affiliates	77.4	62.2	47.3
Local ETVs	.2	.2	.3
TOTAL LOCAL STATIONS	77.7	62.4	47.6
Distant Stations	22.1	34.8	25.5
Pay Cable Channels			23.3
Other Cable Only Channels		1.3	2.7
TOTAL NON-MARKET SOURCES	22.1	36.2	51.6
AVERAGE WEEKLY PRIME TIME SHARES			
Local UHF Affiliates	82.0	71.8	56.4
Local ETVs	.5	.6	.4
TOTAL LOCAL STATIONS	82.5	72.5	56.9
Distant Stations	17.3	24.6	14.5
Pay Cable Channels			25.6
Other Cable Only Channels		1.9	2.7
TOTAL NON-MARKET SOURCES	17.3	26.5	42.8
AVERAGE WEEKLY CIRCULATION			
Local UHF Affiliates	83.1	80.8	80.7

TABLE III-27

Market Type 7 (3 UHF)

Weekly Station Use Among Women 18-49

Reception Type	Broadcast	Basic Cable	Pay Cable
AVERAGE WEEKLY SHARES			
Local UHF Affiliates	78.4	67.3	57.6
Local ETVs	.3	.2	.1
TOTAL LOCAL STATIONS	78.7	67.6	57.7
Distant Stations	21.1	30.7	25.3
Pay Cable Channels			15.6
Other Cable Only Channels		.8	1.1
TOTAL NON-MARKET SOURCES	21.1	31.5	42.0
AVERAGE WEEKLY PRIME TIME SHARES			
Local UHF Affiliates	84.3	78.8	64.9
Local ETVs	.5	.6	.3
TOTAL LOCAL STATIONS	84.7	79.4	65.1
Distant Stations	15.2	18.6	15.2
Pay Cable Channels			18.6
Other Cable Only Channels		.9	1.2
TOTAL NON-MARKET SOURCES	15.2	19.6	34.9
AVERAGE WEEKLY CIRCULATION			
Local UHF Affiliates	84.0	83.8	86.7

TABLE III-28

Market Type 7 (3 UHF)

Weekly Station Use Among Adults 50 and Older

Reception Type	Broadcast	Basic Cable	Pay Cable
AVERAGE WEEKLY SHARES			
Local UHF Affiliates	84.2	67.3	63.2
Local ETVs	.3	.4	.3
TOTAL LOCAL STATIONS	84.5	67.7	63.5
Distant Stations	15.1	30.5	24.1
Pay Cable Channels			10.0
Other Cable Only Channels		1.6	1.9
TOTAL NON-MARKET SOURCES	15.1	32.1	36.1
AVERAGE WEEKLY PRIME TIME SHARES			
Local UHF Affiliates	84.4	69.7	64.9
Local ETVs	.8	.9	.3
TOTAL LOCAL STATIONS	85.2	70.6	65.3
Distant Stations	14.1	25.9	18.6
Pay Cable Channels			14.3
Other Cable Only Channels		3.2	1.4
TOTAL NON-MARKET SOURCES	14.1	29.1	34.4
AVERAGE WEEKLY CIRCULATION			
Local UHF Affiliates	85.1	85.9	88.2

TABLE III-29

Market Type 8 (2 Stations)

Weekly Station Use Among TVHH

Reception Type	Broadcast	Basic Cable	Pay Cable
AVERAGE WEEKLY SHARES			
Local Affiliates	63.1	45.8	37.2
Local ETVs	2.1	1.2	1.1
TOTAL LOCAL STATIONS	65.2	47.0	38.2
Distant Stations	34.5	51.1	45.7
Pay Cable Channels			13.9
Other Cable Only Channels		1.7	2.1
TOTAL NON-MARKET SOURCES	34.5	52.9	61.7
AVERAGE WEEKLY PRIME TIME SHARES			
Local Affiliates	62.1	50.0	39.1
Local ETVs	2.9	2.5	1.6
TOTAL LOCAL STATIONS	65.0	52.5	40.7
Distant Stations	35.1	45.7	36.8
Pay Cable Channels			20.5
Other Cable Only Channels		1.6	1.7
TOTAL NON-MARKET SOURCES	35.1	47.3	59.1
AVERAGE WEEKLY CIRCULATION			
Local Affiliates	86.2	91.5	92.8

TABLE III-30

Market Type 8 (2 Stations)

Weekly Station Use Among Men 18-49

Reception Type	Broadcast	Basic Cable	Pay Cable
AVERAGE WEEKLY SHARES			
Local Affiliates	64.1	47.1	37.8
Local ETVs	2.6	.8	.5
TOTAL LOCAL STATIONS	66.7	48.0	38.4
Distant Stations	33.1	50.1	39.8
Pay Cable Channels			18.8
Other Cable Only Channels		1.7	2.6
TOTAL NON-MARKET SOURCES	33.1	51.8	61.3
AVERAGE WEEKLY PRIME TIME SHARES			
Local Affiliates	63.4	53.1	36.8
Local ETVs	3.6	1.5	1.2
TOTAL LOCAL STATIONS	67.1	54.7	38.1
Distant Stations	32.7	43.0	36.4
Pay Cable Channels			23.5
Other Cable Only Channels		1.9	1.8
TOTAL NON-MARKET SOURCES	32.7	45.0	61.8
AVERAGE WEEKLY CIRCULATION			
Local Affiliates	84.7	87.7	84.0

TABLE III-31

Market Type 8 (2 Stations)

Weekly Station Use Among Women 18-49

Reception Type	Broadcast	Basic Cable	Pay Cable
AVERAGE WEEKLY SHARES			
Local Affiliates	67.8	50.7	43.0
Local ETVs	1.7	1.0	.9
TOTAL LOCAL STATIONS	69.5	51.7	43.8
Distant Stations	30.3	47.6	40.2
Pay Cable Channels			14.7
Other Cable Only Channels		.5	1.2
TOTAL NON-MARKET SOURCES	30.3	48.2	56.2
AVERAGE WEEKLY PRIME TIME SHARES			
Local Affiliates	65.7	54.6	42.9
Local ETVs	2.7	1.6	.9
TOTAL LOCAL STATIONS	68.5	56.2	43.8
Distant Stations	31.3	43.1	33.6
Pay Cable Channels			21.0
Other Cable Only Channels		.5	1.4
TOTAL NON-MARKET SOURCES	31.3	43.7	56.1
AVERAGE WEEKLY CIRCULATION			
Local Affiliates	81.4	84.8	86.7

TABLE III-32

Market Type 8 (2 Stations)

Weekly Station Use Among Adults 50 and Older

Reception Type	Broadcast	Basic Cable	Pay Cable
AVERAGE WEEKLY SHARES			
Local Affiliates	62.6	46.8	34.3
Local ETVs	1.4	1.3	1.4
TOTAL LOCAL STATIONS	64.0	48.1	35.7
Distant Stations	35.9	49.9	49.8
Pay Cable Channels			12.2
Other Cable Only Channels		1.7	2.1
TOTAL NON-MARKET SOURCES	35.9	51.7	64.2
AVERAGE WEEKLY PRIME TIME SHARES			
Local Affiliates	60.3	47.2	34.6
Local ETVs	2.9	3.1	2.9
TOTAL LOCAL STATIONS	63.3	50.4	37.5
Distant Stations	36.5	47.6	39.3
Pay Cable Channels			20.2
Other Cable Only Channels		1.7	2.6
TOTAL NON-MARKET SOURCES	36.5	49.4	62.2
AVERAGE WEEKLY CIRCULATION			
Local Affiliates	75.7	89.1	92.9

Program Audiences

This section of the results describes station audiences across reception types at those times of the day when network affiliates were airing their early evening local news, late evening local news and prime time access programs. Table I-2 identifies the markets and specific quarter hours that were included in these analyses. The reader should note that the markets used in this part of the study were reorganized into four types defined by market rank. As with the results on weekly station audiences, shares may not total to 100 due to rounding error and the omission of unidentified viewing.

Early Evening Local News. Tables IV-1 thru IV-4 present the results on the audience for early evening local news. Though each market type presented a somewhat different picture, certain regularities in the data can be seen. Within each market type, local news achieved its highest shares among adults age 50 and older. Further, viewers in that age group were less likely than younger adults to tune to a non-market signal even with cable services available. Within each market type local news shares were always highest among broadcast viewers and lowest among pay cable viewers, with basic cable viewers typically falling somewhere in between. The size of the reduction in audience share, however, differed with market size. The local news programs in larger markets evidenced

a relatively modest decline across reception types in comparison to smaller markets. Generally, the smaller the market size, the greater was the tendency of cable and pay cable viewers to watch distant stations. Across all market types, pay cable channels and other cable only channels drew relatively small audience shares.

Late Evening Local News. With some exceptions, the impact of cable and pay cable on late news was similar to its impact on early news. Across every market and every demographic group local news shares were highest among broadcast viewers, lower among basic cable viewers and lower still among pay cable viewers. Generally the magnitude of these reductions was greatest in smaller markets. Late evening local news shares were again highest among adults 50 and older. The principle difference between early and late local news audiences was that pay cable viewers were more likely to be watching a pay channel during the late news programming. As with the results on weekly station audiences, pay channel shares were highest among men 18 to 49.

Prime Time Access. Tables VI-1 thru VI-4 report the audience for local stations during prime time access. Within every demographic group, across all market types, local affiliate shares evidenced a gradual decline from broadcast to basic cable to pay cable viewers. The same, however was not necessarily true for the combined shares

of other local stations. In all but the largest market type (ARB 1-10), affiliates shares among broadcast viewers were comparable across demographic subgroups. As with early news audiences, however, adults 50 and older were less inclined to watch non-market signals, even if they subscribed to cable or pay cable services. Among pay cable viewers, pay channel shares were still relatively small during prime time access as compared to their average prime time levels. Selected program type averages varied considerably across market types and demographic groups, suggesting that no one kind of program is more or less successful at retaining local audiences in non-broadcast households.

TABLE IV-1

ARB Markets 1-10

Average Shares Monday Thru Friday
During Early Evening Local News

Reception Type	Broadcast	Basic Cable	Pay Cable
MEN 18 TO 49			
Local Affiliate News	58.0	52.3	50.1
Other Local Stations	37.1	28.1	32.4
TOTAL LOCAL STATIONS	95.1	80.4	82.5
Distant Stations	4.8	19.3	11.1
Pay Cable Channels			5.9
Other Cable Only Channels		.2	.3
TOTAL NON-MARKET SOURCES	4.8	19.5	17.3
WOMEN 18 TO 49			
Local Affiliate News	55.4	50.1	46.5
Other Local Stations	39.8	25.2	32.7
TOTAL LOCAL STATIONS	95.3	75.3	79.3
Distant Stations	4.3	24.4	13.3
Pay Cable Channels			4.4
Other Cable Only Channels		.3	2.7
TOTAL NON-MARKET SOURCES	4.3	24.7	20.4
ADULTS 50 AND OLDER			
Local Affiliate News	78.7	70.4	70.1
Other Local Stations	14.2	14.3	19.5
TOTAL LOCAL STATIONS	92.9	84.7	89.7
Distant Stations	6.8	14.0	4.5
Pay Cable Channels			3.8
Other Cable Only Channels		1.2	1.9
TOTAL NON-MARKET SOURCES	6.8	15.2	10.1

TABLE IV-2

ARB Markets 21-45

Average Shares Monday Thru Friday
During Early Evening Local News

Reception Type	Broadcast	Basic Cable	Pay Cable
MEN 18 TO 49			
Local Affiliate News	82.7	74.4	67.6
Other Local Stations	10.9	9.7	9.2
TOTAL LOCAL STATIONS	93.7	84.1	76.8
Distant Stations	6.1	15.4	15.7
Pay Cable Channels			4.1
Other Cable Only Channels		.4	3.3
TOTAL NON-MARKET SOURCES	6.1	15.8	23.1
WOMEN 18 TO 49			
Local Affiliate News	82.7	74.4	64.5
Other Local Stations	12.2	9.1	9.3
TOTAL LOCAL STATIONS	94.9	83.6	73.8
Distant Stations	5.0	15.9	18.6
Pay Cable Channels			5.9
Other Cable Only Channels			1.6
TOTAL NON-MARKET SOURCES	5.0	15.9	26.1
ADULTS 50 AND OLDER			
Local Affiliate News	91.2	91.8	89.6
Other Local Stations	5.6	2.8	3.4
TOTAL LOCAL STATIONS	96.8	94.6	93.1
Distant Stations	3.1	4.6	4.6
Pay Cable Channels			1.8
Other Cable Only Channels		.7	.3
TOTAL NON-MARKET SOURCES	3.1	5.4	6.7

TABLE IV-3

ARB Markets 51-75

Average Shares Monday Thru Friday
During Early Evening Local News

Reception Type	Broadcast	Basic Cable	Pay Cable
MEN 18 TO 49			
Local Affiliate News	86.3	65.8	61.8
Other Local Stations	7.4	9.2	5.4
TOTAL LOCAL STATIONS	93.8	75.0	67.2
Distant Stations	5.8	22.9	27.4
Pay Cable Channels			3.6
Other Cable Only Channels		.9	
TOTAL NON-MARKET SOURCES	5.8	23.9	31.1
WOMEN 18 TO 49			
Local Affiliate News	85.8	68.3	60.4
Other Local Stations	6.0	4.2	3.6
TOTAL LOCAL STATIONS	91.8	72.5	64.1
Distant Stations	7.8	25.4	30.6
Pay Cable Channels			4.6
Other Cable Only Channels		.7	
TOTAL NON-MARKET SOURCES	7.8	26.2	35.2
ADULTS 50 AND OLDER			
Local Affiliate News	91.6	82.9	88.9
Other Local Stations	.9	3.2	1.5
TOTAL LOCAL STATIONS	92.5	86.1	90.4
Distant Stations	7.4	13.4	7.9
Pay Cable Channels			1.6
Other Cable Only Channels		.4	
TOTAL NON-MARKET SOURCES	7.4	13.8	9.5

TABLE IV-4

ARB Markets 101-125

Average Shares Monday Thru Friday
During Early Evening Local News

Reception Type	Broadcast	Basic Cable	Pay Cable
MEN 18 TO 49			
Local Affiliate News	89.0	67.8	52.2
Other Local Stations	.1	1.9	.7
TOTAL LOCAL STATIONS	89.1	69.7	52.9
Distant Stations	10.0	28.1	33.9
Pay Cable Channels			7.8
Other Cable Only Channels		2.0	5.3
TOTAL NON-MARKET SOURCES	10.9	30.2	47.0
WOMEN 18 TO 49			
Local Affiliate News	91.1	67.3	62.9
Other Local Stations	.5		.3
TOTAL LOCAL STATIONS	91.4	67.3	63.2
Distant Stations	7.9	31.4	30.6
Pay Cable Channels			3.8
Other Cable Only Channels		1.2	2.2
TOTAL NON-MARKET SOURCES	7.9	32.6	36.7
ADULTS 50 AND OLDER			
Local Affiliate News	93.0	83.6	79.3
Other Local Stations	.2	.4	
TOTAL LOCAL STATIONS	93.2	84.0	79.3
Distant Stations	6.7	14.2	16.0
Pay Cable Channels			1.0
Other Cable Only Channels		1.5	3.5
TOTAL NON-MARKET SOURCES	6.7	15.8	20.5

TABLE V-1

ARB Markets 1-10

Average Shares Monday Thru Friday
During Late Evening Local News

Reception Type	Broadcast	Basic Cable	Pay Cable
MEN 18 TO 49			
Local Affiliate News	76.0	69.3	56.6
Other Local Stations	17.4	15.5	12.5
TOTAL LOCAL STATIONS	93.4	84.8	69.2
Distant Stations	6.5	14.0	8.2
Pay Cable Channels			20.0
Other Cable Only Channels		1.1	1.5
TOTAL NON-MARKET SOURCES	6.5	15.1	29.8
WOMEN 18 TO 49			
Local Affiliate News	81.4	78.3	68.4
Other Local Stations	13.0	8.3	12.0
TOTAL LOCAL STATIONS	94.4	86.7	80.4
Distant Stations	5.4	13.2	6.3
Pay Cable Channels			12.8
Other Cable Only Channels			.3
TOTAL NON-MARKET SOURCES	5.4	13.2	19.5
ADULTS 50 AND OLDER			
Local Affiliate News	87.6	80.0	74.4
Other Local Stations	7.8	8.5	10.6
TOTAL LOCAL STATIONS	95.4	88.4	85.1
Distant Stations	4.5	9.9	3.4
Pay Cable Channels			10.6
Other Cable Only Channels		1.8	.7
TOTAL NON-MARKET SOURCES	4.5	11.6	14.7

TABLE V-2

ARB Markets 21-45

Average Shares Monday Thru Friday
During Late Evening Local News

Reception Type	Broadcast	Basic Cable	Pay Cable
MEN 18 TO 49			
Local Affiliate News	83.6	78.1	58.1
Other Local Stations	3.4	6.2	6.1
TOTAL LOCAL STATIONS	87.0	84.3	64.2
Distant Stations	12.1	14.1	5.7
Pay Cable Channels			25.7
Other Cable Only Channels		1.1	3.9
TOTAL NON-MARKET SOURCES	12.1	15.3	35.3
WOMEN 18 TO 49			
Local Affiliate News	90.1	82.9	62.8
Other Local Stations	7.0	5.1	7.0
TOTAL LOCAL STATIONS	97.1	88.0	69.8
Distant Stations	2.5	10.5	4.8
Pay Cable Channels			22.3
Other Cable Only Channels		.8	3.1
TOTAL NON-MARKET SOURCES	2.5	11.3	30.2
ADULTS 50 AND OLDER			
Local Affiliate News	90.4	87.0	77.3
Other Local Stations	7.1	1.6	4.6
TOTAL LOCAL STATIONS	97.5	88.6	81.9
Distant Stations	2.3	10.9	9.2
Pay Cable Channels			6.6
Other Cable Only Channels		.4	2.1
TOTAL NON-MARKET SOURCES	2.3	11.3	18.0

TABLE V-3

ARB Markets 51-75

Average Shares Monday Thru Friday
During Late Evening Local News

Reception Type	Broadcast	Basic Cable	Pay Cable
MEN 18 TO 49			
Local Affiliate News	86.1	78.5	54.2
Other Local Stations	3.4	1.8	3.1
TOTAL LOCAL STATIONS	89.5	80.2	57.3
Distant Stations	10.3	18.8	15.3
Pay Cable Channels			23.4
Other Cable Only Channels		1.1	3.4
TOTAL NON-MARKET SOURCES	10.3	19.8	42.0
WOMEN 18 TO 49			
Local Affiliate News	88.5	75.7	67.3
Other Local Stations	4.6	4.0	4.5
TOTAL LOCAL STATIONS	93.1	79.7	71.8
Distant Stations	6.7	19.1	10.9
Pay Cable Channels			16.1
Other Cable Only Channels		.8	.3
TOTAL NON-MARKET SOURCES	6.7	19.9	27.4
ADULTS 50 AND OLDER			
Local Affiliate News	89.6	84.9	74.3
Other Local Stations	1.4	.6	3.6
TOTAL LOCAL STATIONS	91.0	85.5	78.0
Distant Stations	9.0	14.2	4.2
Pay Cable Channels			14.9
Other Cable Only Channels			.4
TOTAL NON-MARKET SOURCES	9.0	14.2	19.5

TABLE V-4

ARB Markets 101-125

Average Shares Monday Thru Friday
During Late Evening Local News

Reception Type	Broadcast	Basic Cable	Pay Cable
MEN 18 TO 49			
Local Affiliate News	86.0	71.5	41.2
Other Local Stations	1.2		.3
TOTAL LOCAL STATIONS	87.2	71.5	41.6
Distant Stations	11.2	20.3	25.7
Pay Cable Channels			29.7
Other Cable Only Channels		8.1	2.6
TOTAL NON-MARKET SOURCES	11.2	28.4	58.0
WOMEN 18 TO 49			
Local Affiliate News	84.0	76.4	47.0
Other Local Stations	1.3		
TOTAL LOCAL STATIONS	85.4	76.4	47.0
Distant Stations	14.2	19.7	25.9
Pay Cable Channels			26.0
Other Cable Only Channels		3.8	1.0
TOTAL NON-MARKET SOURCES	14.2	23.6	52.9
ADULTS 50 AND OLDER			
Local Affiliate News	92.6	77.1	54.6
Other Local Stations	.2		
TOTAL LOCAL STATIONS	92.8	77.1	54.6
Distant Stations	6.7	20.1	23.3
Pay Cable Channels			18.4
Other Cable Only Channels		2.7	3.5
TOTAL NON-MARKET SOURCES	6.7	22.8	45.3

TABLE VI-1

ARB Markets 1-10

Average Shares Monday Thru Friday
During Prime Time Access

Reception Type	Broadcast	Basic Cable	Pay Cable
MEN 18 TO 49			
Local Affiliates	55.5	46.9	44.9
Other Local Stations	39.3	34.7	32.2
TOTAL LOCAL STATIONS	94.8	81.7	77.2
Distant Stations	4.7	18.1	11.8
Pay Cable Channels			9.3
Other Cable Only Channels		.1	1.3
TOTAL NON-MARKET SOURCES	4.7	18.2	22.3
Selected Program Type Averages			
Off Network			
First Run Syndication	18.9	16.3	15.0
Programs w/Local Production	17.5	14.3	14.8
WOMEN 18 TO 49			
Local Affiliates	56.9	56.2	49.6
Other Local Stations	36.0	32.6	29.6
TOTAL LOCAL STATIONS	93.0	88.8	79.2
Distant Stations	6.7	11.1	10.6
Pay Cable Channels			9.0
Other Cable Only Channels			.7
TOTAL NON-MARKET SOURCES	6.7	11.1	20.4
Selected Program Type Averages			
Off Network			
First Run Syndication	19.7	15.8	17.4
Programs w/Local Production	17.3	18.4	14.7
ADULTS 50 AND OLDER			
Local Affiliates	76.1	67.2	61.9
Other Local Stations	15.2	15.2	19.5
TOTAL LOCAL STATIONS	91.4	82.4	81.4
Distant Stations	8.4	16.9	8.4
Pay Cable Channels			8.0
Other Cable Only Channels		.5	1.8
TOTAL NON-MARKET SOURCES	8.4	17.5	18.2
Selected Program Type Averages			
Off Network			
First Run Syndication	28.3	25.4	21.8
Programs w/Local Production	19.4	16.3	18.2

TABLE VI-2

ARB Markets 21-45

Average Shares Monday Thru Friday
During Prime Time Access

Reception Type	Broadcast	Basic Cable	Pay Cable
MEN 18 TO 49			
Local Affiliates	80.5	62.6	47.9
Other Local Stations	10.5	11.4	11.3
TOTAL LOCAL STATIONS	91.1	74.1	59.2
Distant Stations	8.3	23.3	23.5
Pay Cable Channels			13.8
Other Cable Only Channels		1.6	3.3
TOTAL NON-MARKET SOURCES	8.3	24.9	40.7
Selected Program Type Averages			
Off Network			
First Run Syndication	22.6	18.4	15.8
Programs w/Local Production	35.3	25.9	16.3
WOMEN 18 TO 49			
Local Affiliates	82.7	60.5	52.1
Other Local Stations	10.6	15.0	12.9
TOTAL LOCAL STATIONS	93.3	75.6	65.1
Distant Stations	6.0	22.7	20.3
Pay Cable Channels			12.1
Other Cable Only Channels		.8	2.2
TOTAL NON-MARKET SOURCES	6.0	23.6	34.7
Selected Program Type Averages			
Off Network			
First Run Syndication	22.9	18.9	17.8
Programs w/Local Production	36.7	22.6	16.4
ADULTS 50 AND OLDER			
Local Affiliates	80.2	72.3	65.3
Other Local Stations	13.7	7.2	11.9
TOTAL LOCAL STATIONS	93.9	79.5	77.3
Distant Stations	5.7	18.3	14.8
Pay Cable Channels			7.7
Other Cable Only Channels		2.1	.1
TOTAL NON-MARKET SOURCES	5.7	20.4	22.7
Selected Program Type Averages			
Off Network			
First Run Syndication	26.6	24.6	17.8
Programs w/Local Production	26.9	22.9	38.4

TABLE VI-3

ARB Markets 51-75

Average Shares Monday Thru Friday
During Prime Time Access

Reception Type	Broadcast	Basic Cable	Pay Cable
MEN 18 TO 49			
Local Affiliates	81.3	54.3	49.1
Other Local Stations	8.6	6.6	6.7
TOTAL LOCAL STATIONS	89.9	60.9	55.8
Distant Stations	9.9	37.5	32.1
Pay Cable Channels			10.4
Other Cable Only Channels		1.5	1.6
TOTAL NON-MARKET SOURCES	9.9	39.0	44.1
Selected Program Type Averages			
Off Network	33.5	12.5	16.3
First Run Syndication	15.5	21.2	12.6
Programs w/Local Production	31.5	24.6	22.5
WOMEN 18 TO 49			
Local Affiliates	82.7	60.1	47.0
Other Local Stations	7.0	5.3	8.7
TOTAL LOCAL STATIONS	89.7	65.4	55.8
Distant Stations	10.1	33.4	34.0
Pay Cable Channels			9.7
Other Cable Only Channels		.8	.1
TOTAL NON-MARKET SOURCES	10.1	34.2	43.9
Selected Program Type Averages			
Off Network	31.3	15.8	12.7
First Run Syndication	21.1	17.8	15.4
Programs w/Local Production	29.9	31.8	21.9
ADULTS 50 AND OLDER			
Local Affiliates	80.3	67.4	57.0
Other Local Stations	1.7	3.4	9.8
TOTAL LOCAL STATIONS	82.0	70.8	66.9
Distant Stations	18.0	28.3	20.6
Pay Cable Channels			9.7
Other Cable Only Channels		1.	2.6
TOTAL NON-MARKET SOURCES	18.0	29.2	33.0
Selected Program Type Averages			
Off Network	22.6	15.8	16.8
First Run Syndication	23.9	22.7	14.1
Programs w/Local Production	39.2	35.3	30.6

TABLE VI-4

ARB Markets 101-125

Average Shares Monday Thru Friday
During Prime Time Access

Reception Type	Broadcast	Basic Cable	Pay Cable
MEN 18 TO 49			
Local Affiliates	85.1	64.2	53.7
Other Local Stations	.6		.2
TOTAL LOCAL STATIONS	85.7	64.2	54.0
Distant Stations	13.4	29.2	28.1
Pay Cable Channels			15.9
Other Cable Only Channels		6.0	1.8
TOTAL NON-MARKET SOURCES	13.4	35.2	45.8
Selected Program Type Averages			
Off Network	28.8	19.6	17.6
First Run Syndication	33.2	21.6	17.5
Programs w/Local Production			
WOMEN 18 TO 49			
Local Affiliates	88.7	67.2	59.2
Other Local Stations	.3		.2
TOTAL LOCAL STATIONS	89.0	67.2	59.4
Distant Stations	10.3	30.3	30.0
Pay Cable Channels			9.3
Other Cable Only Channels		1.6	1.1
TOTAL NON-MARKET SOURCES	10.3	31.9	40.5
Selected Program Type Averages			
Off Network	22.8	19.1	12.3
First Run Syndication	33.9	21.4	30.5
Programs w/Local Production			
ADULTS 50 AND OLDER			
Local Affiliates	87.6	68.5	63.8
Other Local Stations	1.5	1.9	3.5
TOTAL LOCAL STATIONS	89.1	70.4	67.3
Distant Stations	10.8	27.4	23.8
Pay Cable Channels			8.2
Other Cable Only Channels		2.1	.6
TOTAL NON-MARKET SOURCES	10.8	29.5	32.6
Selected Program Type Averages			
Off Network	33.1	11.4	15.9
First Run Syndication	46.2	35.4	29.5
Programs w/Local Production			

CONCLUSIONS

This study distilled the television viewing behavior of thousands of individuals living in many different areas of the United States into a series of simple tables. Before reaching any conclusions about the impact of cable on local stations, a number of cautions should be borne in mind.

First, the results reported in this study provide only a general description of differences among audiences with access to alternative viewing options. Despite frequently recurring patterns in the data, summarizing results for types of stations or programs in types of markets inevitably masks some exceptions to the rule. Not all stations of a type offer exactly the same mix of programming. Not all stations have equally long broadcast days or equally large coverage areas. Not all stations devote the same resources to their local news operations. All these, and countless other factors, can affect the results for any given station in any given market.

Similarly, combining three markets to create a market type can hide market specific differences. For example, the audience for "distant stations" in broadcast households varied from market to market. In ADI's near

another market with strong stations, distant station viewing was considerable. In other more geographically isolated markets, distant station viewing was negligible.

Second, these results were based on data collected during the February sweep in 1982. As such, they may not be a perfect representation of audience behavior at other times of the year when, for example, affiliates broadcast reruns and total amounts of television viewing are lower.

Third, and perhaps most importantly, these data can only describe differences across reception types. They cannot tell us why those differences exist. For example, we know that pay cable viewers tend to watch more television than other people. One explanation for this is that current pay cable subscribers have always been heavier users for television and simply opted to take pay service when it became available, in order to satisfy their appetite for television. On the other hand, it could be that pay subscribers increased their levels of TV use only after the introduction of new viewing options. Consequently, the time they spend viewing local stations might be the same as its always been. This is a critical distinction. If the latter explanation is true, then the impact of cable on local stations may be less dramatic than it at first appears. As is often the case, the truth probably lies somewhere in between these extremes.

Bearing all these caveats and qualifications in mind,

the results still paint a consistent enough picture that a number of conclusions seem warranted.

The rationale for this study reflected a concern that the viewing alternatives delivered by cable and pay cable television might be eroding the audiences for local stations. That is, as the number of channels available to viewers has increased, it would be reasonable to assume that these new competitors would attract some share of the audience and so fragment viewing in the market area.

This expectation is generally consistent with formal economic models of audience behavior.[1] In theory, new competitors would first try to capture a portion of the viewers from stations with the largest audiences, by offering more attractive progamming of the same general type. If the market for "mass appeal" programming becomes saturated, additional competitors would be expected to offer more specialized kinds of services in an effort to attract smaller special interest audiences. Eventually, most channels might cater to relatively small subsets of the audience, not unlike the current situation in large radio markets. That, at any rate, is the theory.

The results of this study lend at least partial support to such expectations. Table VII is a summary of

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[1]Owen, B., Beebe, J., & Manning, W. Television economics. Lexington, Massachusetts: D.C. Heath, 1974.

TABLE VII

Average Weekly TVHH Shares in Different Market Types by Reception Type

Reception Type	Broadcast	Basic Cable	Pay Cable
MARKET TYPE 1 (4 VHF/1+ UHF)			
Total Local Stations	95.7	81.3	69.3
Distant Stations	4.0	13.5	9.5
Pay Cable Channels			17.1
Other Cable Only Channels		4.7	3.6
MARKET TYPE 2 (3 VHF/2+ UHF)			
Total Local Stations	89.4	77.6	64.8
Distant Stations	10.4	18.3	16.7
Pay Cable Channels			15.3
Other Cable Only Channels		3.3	2.5
MARKET TYPE 3 (3 VHF/1 UHF)			
Total Local Stations	92.7	77.2	63.3
Distant Stations	6.9	18.9	15.1
Pay Cable Channels			18.0
Other Cable Only Channels		2.9	2.7
MARKET TYPE 4 (3 VHF)			
Total Local Stations	87.6	66.8	53.4
Distant Stations	11.9	30.9	26.9
Pay Cable Channels			17.1
Other Cable Only Channels		1.9	2.0

TABLE VII (continued)

Average Weekly TVHH Shares in Different Market Types by Reception Type

Reception Type	Broadcast	Basic Cable	Pay Cable
MARKET TYPE 5 (2 VHF/1 UHF)			
Total Local Stations	87.8	67.9	52.8
Distant Stations	12.0	26.0	26.6
Pay Cable Channels			15.9
Other Cable Only Channels		5.5	4.0
MARKET TYPE 6 (1 VHF/2 UHF)			
Total Local Stations	88.9	78.6	57.6
Distant Stations	10.6	16.5	15.8
Pay Cable Channels			19.5
Other Cable Only Channels		4.6	6.7
MARKET TYPE 7 (3 UHF)			
Total Local Stations	78.9	63.6	53.0
Distant Stations	21.0	33.9	28.6
Pay Cable Channels			15.9
Other Cable Only Channels		1.3	2.2
MARKET TYPE 8 (2 STATIONS)			
Total Local Stations	65.2	48.0	38.2
Distant Stations	34.5	50.1	45.7
Pay Cable Channels			13.9
Other Cable Only Channels		1.7	2.1

the results in which the combined average weekly TVHH shares of all local stations and non-market sources (i.e., distant stations, pay cable channels and other cable only channels) are presented across market and reception types.

While most local stations were adversely affected by cable competition, in absolute terms, network affiliates seem to have suffered the greatest losses. Perhaps this is because they typically have the most to lose. Nevertheless, the program offerings of imported stations and pay cable channels would appear to have taken a disproportionate toll on their audiences in homes with access to these alternatives. Conversely, the audiences for educational stations, though quite small to begin with, do not appear to have suffered in so uniform a way. This may be because cable systems have yet to offer a viable alternative to their programming.

Interestingly, the audience for individual special interest cable channels like news, sports and religious networks was very small. This evidence could indicate that, theoretical expectations aside, television viewers have very little appetite for such services. On the other hand, it may simply be that these relatively new entrants are still unfamiliar or unavailable to many cable subscribers. Clearly, their present impact on local station audiences is small. Whether this will continue to be true remains to be seen.

So far, this discussion has dwelt on the competitive threat that cable poses to local broadcasters. While there is certainly cause for concern, one should not overestimate that threat or lose track of cable's benefits. After all, early cable systems helped broadcasters by increasing the reach and clarity of their signals. That is still true today. The data suggest that UHF stations, especially those in intermixed markets, lose their "handicap" in cable households. Generally, the weekly circulation of local stations is the same or higher in homes with cable. So while cable services may reduce the total amount of time an individual spends with local stations, there is no indication that cable subscribers have abandoned their local stations.

In the long run, the impact that cable, and other distribution technologies, will have on local stations depends on a number of unanswered questions.

First, at what rate will the public adopt these new technologies? Cable penetration now stands at something less than a third of all television households. Predicting its rate of growth is difficult at best. We do know that about 45 percent of the homes that could subscribe to cable do not.[2] Similarly, many basic cable homes choose not to take a special pay channel. Perhaps

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[2]Basic cable numbers disappointing: Daniels. Electronic Media. August 5, 1982, p. 23.

these services are too expensive. Perhaps, these viewers are satisfied with the choices they now have.

Second, how will these new technologies themselves be changed? The six channel CATV system of the past is a far cry from the 30, 40 or 100 channel systems being built today. As the capacity and reach of cable systems increase, so too will the incentives and opportunities for new program services. Might such changes induce homes now passed by the cable to subscribe?

Third, will new cable and pay cable subscribers behave as those examined in this research. Perhaps the pay cable households studied here were innovators or special "fans of the medium" who use television differently from their basic cable and broadcast counterparts.[3]

Finally, how will broadcasters respond to the changing environment? Will regulatory reforms allow stations a freer hand at meeting these competitive challenges? Will strategies for program development, acquisition, scheduling and promotion change?

There are, of course, no easy answers to any of these questions. The only thing that seems certain is that we have entered an era of increased competition for the

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[3]Webster, J., & Agostino, D. Cable and pay cable subscribers' viewing of public television. Prepared for the Corporation for Public Broadcasting. Athens, Ohio: Broadcast Research Center, 1982, p. 50.

attention and allegiances of local audiences. Broadcasters must, at the very least, monitor the progress of the competition if they are to respond in a timely manner.